Smart.Biz.Kit User Manual

Version 1.0

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Introduction to the SBK

Welcome the smart.Biz.Kit 2.0 User Manual Documentation. The smart.Biz.Kit (SBK) is quickly becoming an essential business tool that easily allows businesses interact with members of their companies, no matter where their physical location. The SBK system is designed to be simple and easy to install, without the need for a massive IT budget within your company. The benefits of the system are significant and the investment is minimal. This manual outlines the features, and advantages of using the SBK in your daily activities.

Sales Managers

One of the most powerful features of the SBK system is the ability to support remote sales managers and provide them with the information that they need. One of the most important aspects of any company is sales. Sales Managers has a unique position to conquer in that they are always on the move, constantly need up to date information, and can excel when they receive statistical information about the historical buying patterns of their current and prospective clients.

Today's Sales Manager spends the majority of their time on the road. Information must be transported to them on the go. The important information that they need is their schedules, contact information, and sales management tools that guide them through the optimum path to the most successful and profitable sales. Companies with long or short sales cycles can benefit from the SBK's powerful sales optimization technologies that can sort through millions of prospective clients and identify the most probable buyers. Why waist time on the small fish, when you can identify and target the largest sales first.

Call Center Agents

Call Center Agents have a unique position to handle the coordination of the central activities and communications of a business. This job entails some of the most on demand activities, which require on demand information. The SBK system is specifically tailor designed to accommodate these needs and to provide all of the information that is needed to get the job done easier and more effective that ever.

The SBK system is designed to provide the ability for Call Center agents to access any employees schedule calendar on demand. Each Call Center agent has the ability to view, schedule, edit, and remove any employee's appointments from one location. Any changes that are made by the Call Center agent are automatically communicated to the employee through their calendar system. Remote employees can access their data via wireless phone, PDA, or laptop computer. Call Center Agents also have the ability to access the complete Contact Management System and record communication notes and activities that are automatically shared amount the entire group of employees.

Customer Service Agents

Customer Service Agents have the most direct contact with customers within a company. This important position handles some of the most important communication and sometimes intense situations. When customer problems arise, Customer Service agents are normally the front lines of communication for clients. The best way to handle these situations is to have all information about the clients account available in a single location. The smart.Biz.Kit is designed with this concept in mind.

Every employee within a company uses the same system that ties into the same central database. Each user can access the same information as needed and on demand. When a problem arises, even within the same day, the communications from different users in different departments, in different locations is recorded and stored in the same location. This provides a unified, central location for all information about a specific client.

Corporate Administrative Managers

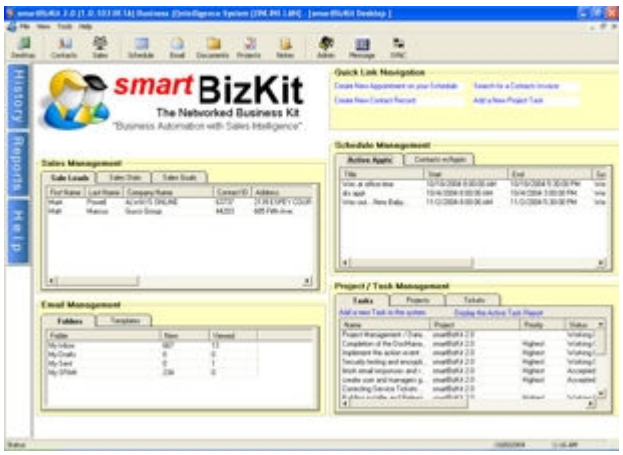
Managers need to have a global view of their entire operations, in a single place, with easy to understand reporting that can allow them to be proactive in their coaching and monitoring of employee activities. With the centralized design of the smart.Biz.Kit, you can achieve such a "view from above" with almost no effort.

Management needs to make decisions based on precision information from throughout their company. As today's companies expand and spread out over more locations and become more virtual through telecommuting, the need to bring together strong, accurate, and precision collaboration is greater than ever. The smart.Biz.Kit was designed with just this thought in mind.

In fact, Smart Technology, the company that designed and developed the smart.Biz.Kit is a virtual company. We are setup so that we have one physical office building that houses our essential call center, and management staff. The key players in our company, everyone from our CEO, CFO, CTO, Development Staff, and Remote Sales Managers work from their homes or from their cars. This has reduced our expenses significantly and allows us to cover a greater area of the country with significantly less resources.

This expanded reach has not restricted us at all. We are able to be 10x more productive, at ¼ of the costs, by using this advanced technology to connect our collaboration. Our technology was developed around real world situations and has allowed us to be extremely effective in our endeavors.

Chapter #1 - Smart.Biz.Kit User Interface



The smart.Biz.Kit User Interface was designed with simplicity and ease of use in mind. Our engineers dedicated a lot of time and attention to the feedback that our users provided us during our development phase to shape the interface to one that was easy enough for anyone to use.

After extensive investigation and user interaction, we discovered the elements of the system that were needed from anywhere in the system and we brought them to the top level of the navigation controls. We then created both a Global Navigation Toolbar that resides on the top of the screen, and also a Sidebar Toolset that provides the secondary Global navigation functions (History, Reports, and Help) that are essential to daily use of the system. All of these functions are detailed below and provide instant access to the most important areas, in a single click.

Global Navigation Toolbar

The global navigation toolbar contains all of the functions that you will need to access the most important functions of the system. No matter where you are in the SBK system, this toolbar will appear on the top of the screen. You can immediately access any of the areas of the system with one click from this menu. The following is a breakdown of each of the options on this toolbar.

Desktop Icon

The Desktop Icon provides access directly to the desktop summary section of the system. This area was designed to provide a brief overview of the entire system in one area. The desktop screen is broken down into specific sections where you can view the most important information from each section in a single place. Users frequently visit this page and area to get an overview of the entire system from a single glance on a single screen.

The Desktop section is described in detail in this chapter below. Please reference that area for a complete description of all of the functions that can be found and activated on the Desktop Toolset. Note: The Desktop Toolset screen is displayed by default when you open the smart.Biz.Kit application after you complete your login.

Contacts Icon

The Contacts Icon provides instant access to the powerful Contact Management engine of the smart.Biz.Kit system. By clicking this icon from the main toolbar on the top of the screen, you will instantly be presented with the Contacts Locator screen that will assist you with locating your contact records in the system.

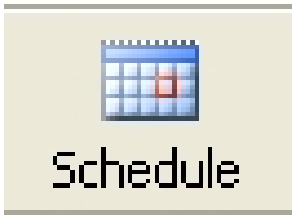
The Contacts Icon and the Contact Management system are also located throughout the system in almost every other tool. Contact information is directly integrated and linked to other tools such as the Scheduling Management, Project Management, Sales Management, and Email Management. Information that is stored in the Contact Management engine is instantly available from anywhere within the system.

Please turn to Chapter #2 for complete documentation on the Contact Management functions and tools.

Sales Icon

The Sales Icon activates the Sales Management functions once pressed. The Sales Management functions offer users a powerful tool for organizing and optimizing their sales lead opportunities. Sophisticated Lead Tracking, Campaign Tracking, Sales Forecasting, and Communication Tracking provide sales managers and Corporate Administrators the information and reporting that they need to stay on top of their sales activities.

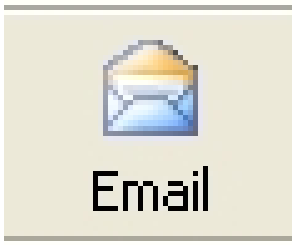
Please turn to Chapter #3 for complete documentation on the Sales Management functions and tools.



Schedule Icon

The Schedule Icon opens the Schedule Management tools that provide advanced group scheduling tools and reporting. Using this section, users can view the calendar, schedule, and task list of any active user on the system. The schedule engine that powers the smart.Biz.Kit is integrated into many other areas of the system such as Project Management, Contact Management, Email Management, Document Management, and more. Powerful printing is available to provide you with the most important appointment management information on paper.

Click the Schedule Icon from the top main menu to activate this section and the group calendar. Please turn to Chapter #4 for complete documentation on the Schedule Management functions and tools.



Email Icon

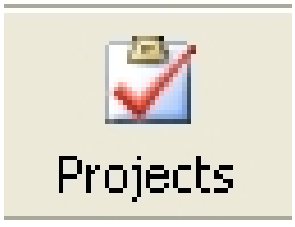
The Email Icon opens the Email Management tools that provide a complete interface with all of the email tools that you need to succeed in your business endeavors. The Email Management engine provides you with all of the features and benefits as you would get with Microsoft Outlook, but with the added protection of built in SPAM filters that keep out unwanted emails. The system also includes easy to use response engine and database tools, automatic email inbox protection, and more.

Click the Email Icon from the top main menu to activate the Email Management tools. Please read chapter #5 for complete directions on the use of the Email Management tools.

Documents Icon

The Documents Icon opens access to the Document Management tools in the smart.Biz.Kit. The Document Management tools provide a central document storage location for all of the users within your group. Using this system, you can create a document on one computer, then save it into your (MyBizDocs) folder that is located on your desktop, then run a database sync and your document is automatically distributed to everyone within your group. The Document Management functions are integrated into numerous other tools within the smart.Biz.Kit including the Scheduling Management, Project Management, Contact Management, Email Management, and more.

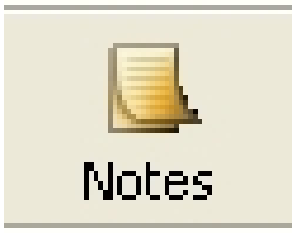
Click the Documents Icon from the top main menu to activate the smart.Biz.Kit Document Tools. You can also open the (MyBizDocs) folder that is on the Desktop of your Microsoft Windows screen. Please read Chapter #6 for complete directions on the use of the Document Management tools.



Projects Icon

The Projects Icon activates the Project Management tools in the smart.Biz.Kit and presents the user with a record search tool that helps you locate Projects, Tasks, or Support Tickets quickly and easily. Projects, Tasks, and Tickets can be time tracked with user notes so that managers can bill for time and materials simply by using the functions of the Project Management system. Tasks can be delegated to other users in the company by simply changing 1 setting. This is used to create powerful workflow execution based on management configured constraints.

Click the Projects Icon from the top main menu to activate the Projects tools and functions. Please read chapter #7 for complete directions on the use of the Project Management tools.



Notes Icon

The Notes Icon provides access to the Notes Management tools for the smart.Biz.Kit. The Notes Management is a basic set of notes tools that allow you to save notes records into the system in a fashion that mimics the famous "sticky note" system. These notes are automatically available to you on any computer that you have smart.Biz.Kit installed onto.

For more information on the Notes Management functions, please read Chapter #8 in this manual.

Admin Icon

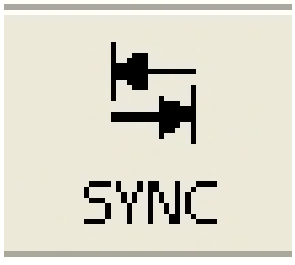
The Admin Icon provides access to the administrative functions for the entire smart.Biz.Kit system. Depending on the access privileges for each user, there will be different functions available. To use all of the options of the Administrative Tools, you will need to be connected to the Internet while using them. You may be notified that an area is not available if you are not connected to the Internet during use of the Admin functions.

For more information on the Administrative Functions of the smart.Biz.Kit, please read Chapter #9 in this manual.

Message Icon

The Message Icon activates the Smart Instant Messenger Tools that provide all users of the smart.Biz.Kit with Instant Messaging capabilities between any remote users of the system. These tools provide a basic tool of Instant Messaging, with the addition of communication tracking that is directly tied into the Contact Management functions of the system.

For more information on the Instant Messaging functions, please read Chapter #10 in this manual.



SYNC Icon

The SYNC Icon activates the Database Synchronization engine that manages all of the data that is transferred between users of the group system. Using our unique data management controls and technologies, our system is designed to move, protect, and optimize data like no other system on the planet. The SYNC icon provides access to all of the tools that are needed to keep your data, and your software up to date.

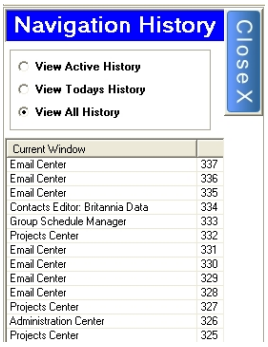
Global Sidebar Toolset

The Global Sidebar Toolset was designed to provide access to three of the most important tools in the system from any screen in the entire smart.Biz.Kit. This toolbar is positioned on the left side of the screen and provides immediate access to the System History Tool, Reports Management Tool, and the System Help Tool.

To access any of these tools, simply click (History), (Reports), or (Help) and the tool will appear on the left side of the screen. When you are finished using the functions of a tool that is open, you can make it disappear by simply clicking on the (Close) button.

Below we have listed a detailed description of the tools and their abilities below.

History Management Tool



The History Management tool was designed to provide a quick way to navigate through the system. Any time a user navigates to any area of the system or to a specific record such as a contact or a task, the system records it in the System History. By opening the History Tools that are located on the left side of the screen, you will be presented with three options for how you want to view your History and also a list of Items that is below the three options.

To return to any of the items that are in your History list, simply double click on the entry and the record or screen will open on the right.

View Active History
By selecting the View Active History option, the system will display all of the history items that you have still active. Items that you have closed in the system will not appear on this list. Items that were left opened will be displayed on the list.

View Today's History
By selecting the View Today's History option, the system will display all of the history items that were opened today. Only today's items will be displayed and the items can be closed or still open.

View All History
By selecting the View All History option, the system will display all of the history items that are stored in the system. Both opened and closed will be displayed in the history list window.

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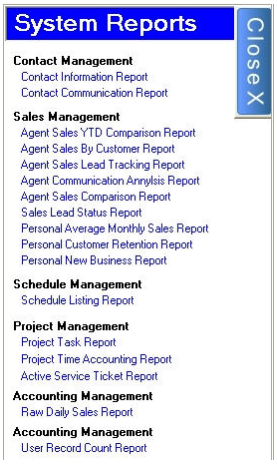
Reports Management Tool

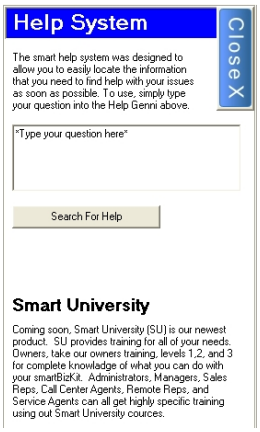


The Reports Management Tool provides an organized listing of all of the reports that are available in the system. To view any of the reports, simply click on the report title and the report will launch on your screen after loading all of the data for the report.

Once the reports are displayed, there are additional filtering and sorting options at the top of each report that will allow you to adjust the way that the reports display the data on the screen. There is also an integrated printing manager that prints high quality reports to any printer on the market.

All report data is real-time from the last time that a user runs their sync engine manager. For complete information on the Reports Management functions and the reports themselves, please read Chapter #12 for complete information.

System Help Tool

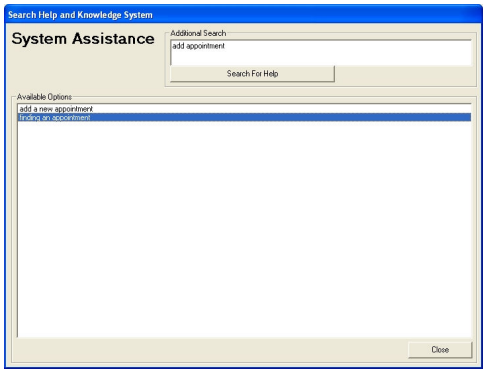

Help System
Close X
The smart help system was designed to allow you to easily locate the information that you need to find help with your issues as soon as possible. To use, simply type your question into the Help Genni above.
Type your question here
Search For Help
Smart University
Coming soon, Smart University (SU) is our newest product. SU provides training for all of your needs. Owners, take our owners training, levels 1,2, and 3 for complete knowladge of what you can do with your smartBizKit. Administrators, Managers, Sales Reps, Call Center Agents, Remote Reps, and Service Agents can all get highly specific training using out Smart University cources.

When you need assistance with the operation of the smart.Biz.Kit, you can always refer to this manual or you can use the System Help Tool that is available on the left side of the smart.Biz.Kit screen no matter where you are in the system.

Searching for System Help

If you click on the Blue (Help) button on the sidebar, you will be presented with the starting point for finding answers to your questions about the system. You will see a box that reads "*Type your question here*". In this box, you will want to type in your initial question in a keyword format. Example: Searching for "Add a new appointment" will locate all help records that have information that will help and it will return the results on the following popup screen that will appear just after you click on the (Search for Help) button after entering your question.

System Assistance Location Tools



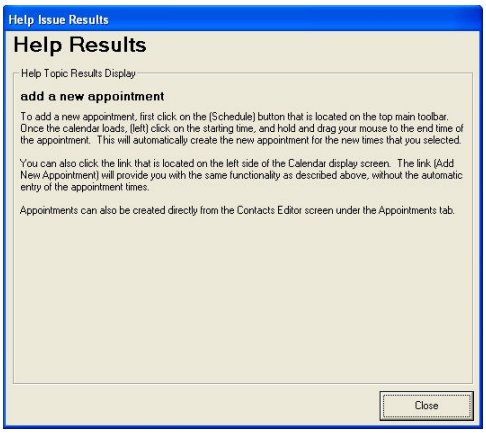
Immediately after clicking the (Search for Help) button, the System Assistance Location Toolset will appear with your question in the Additional Search window, and the results from your original search in the lower results window.

To view one of the articles from the help system, simply double click the title article. If you want to search for another article, simply use the Additional Search box and click the (Search for Help) button.

System Assistance Article Viewer

When you find an article that you are interested in researching, simply double click the title of the article and the Article Viewer will appear. The Article Viewer will display test, graphs, illustrations, videos, and audio clips that will provide advanced assistance for using the system best.

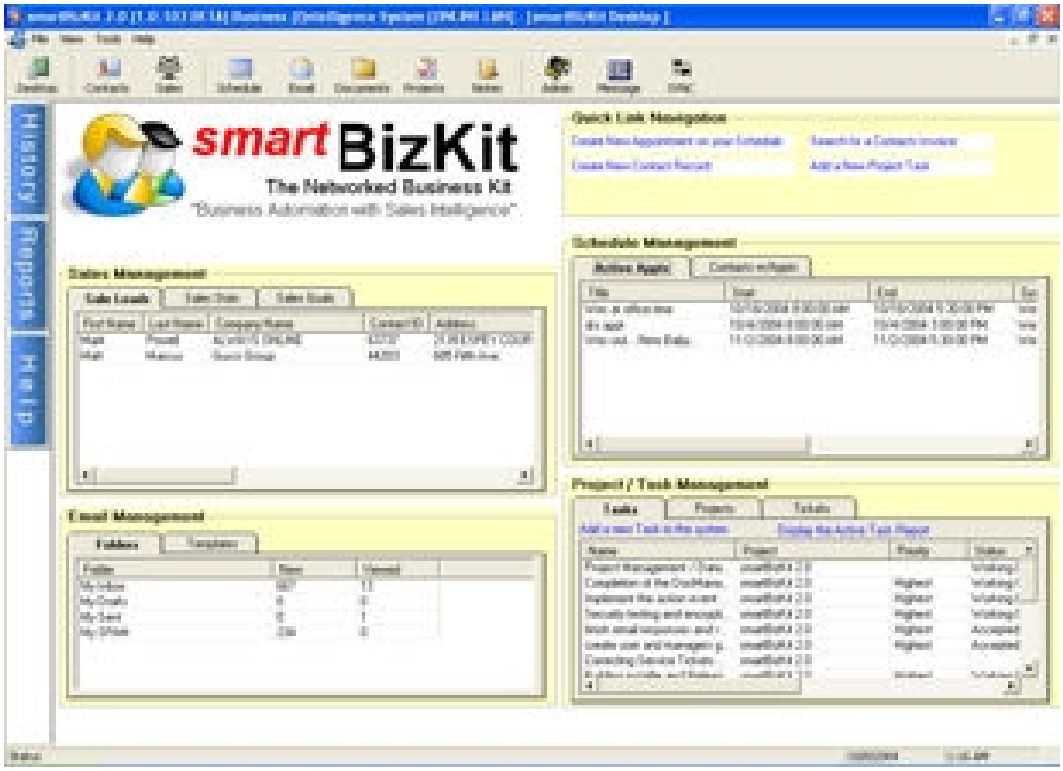
Please read Chapter #13 for more information on getting additional support beyond the capabilities listed in this section.


Help Issue Results
Help Results
Help Topic Results Display
add a new appointment
To add a new appointment, first click on the (Schedule) button that is located on the top main toolbar. Once the calendar loads, (left) click on the starting time, and hold and drag your mouse to the end time of the appointment. This will automatically create the new appointment for the new times that you selected.
You can also click the link that is located on the left side of the Calendar display screen. The link (Add New Appointment) will provide you with the same functionality as described above, without the automatic entry of the appointment times.
Appointments can also be created directly from the Contacts Editor screen under the Appointments tab.
Close

Group Desktop Tools

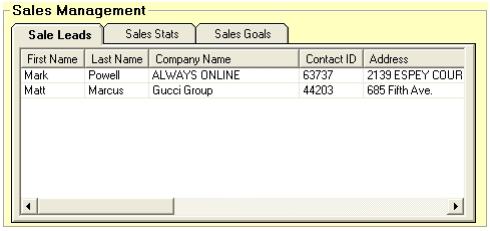
The Group Desktop toolset is the initial screen that you will see after entering the system. As it appears below, the Desktop provides a collection of the most important and actively used records from your system. The desktop provides quick control and navigation information for Sales Management, Email Management, Schedule Management, Project Management, and an additional section of Quick Link navigation options.

The following section provides information about each of these tools in detail.



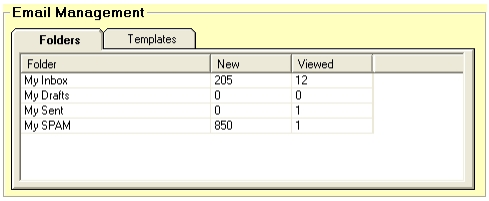
Sales Management

The Sales Management desktop toolset provides quick access to your Sales Leads, your Sales Stats and Graphs, and your personal Sales Goals. The Sales Leads tab will display a listing of all of your currently active sales leads. Use this as your starting point to all of your sales opportunities in the system.



For more information on the Sales Management functions and tool, please read Chapter #3 for complete details.

Email Management

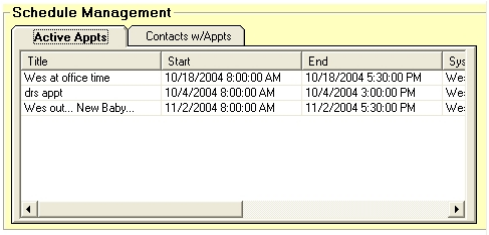


The Email Management desktop toolset provides statistics on how many records that you have in your database. Each Folder that is listed will display the number of records that are new and have not been read, and then the second column will display the number of records that have been viewed. The templates section allows you to create single and bulk emails starting from an Email Response record.

Quick Link Navigation

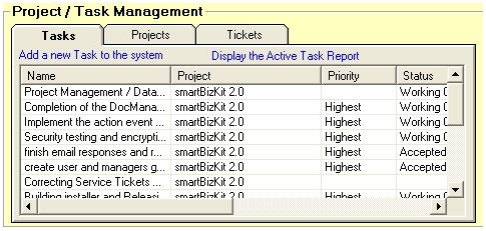
The Quick Link Navigation toolset provides several links to some of the important functions, tools, and areas of the system. Simply click on the title of any item that is in the Quick Link Navigation window to activate it.

Schedule Management



The Schedule Management Displays 2 tabs of information from the Schedule Management engine. The **(Active Appts)** tab provides a listing of all of the appointments that have not been completed. The **(Contacts w/Appts)** will display a listing of the appointments that have one of your contact records scheduled as an attendee. This can be configured using the Appointment Editor from the Schedule Management Engine. You can access any item in the list by double clicking on it.

Project / Task Management



The Project Management Desktop Control displays three tabs and five quick links. We have detailed each of the Tabs below.

(Tasks) Tab

The Tasks tab provides a listing of the tasks that are currently stored in the system and assigned to your user account. The items can be sorted by any column and you can access any record in the list by simply double clicking on the title.

(Add a new Task to the system)

This quick link provides easy access to the add new task function of the Project Management system. Click this link to enter a new task record.

(Display the Active Task Report)

This quick link provides easy access to the Active Task report. Click this link to activate the report as a popup window.

(Projects) Tab
The Projects tab provides a listing of all Projects that are currently active in the system. You can sort the entire listing of projects by clicking on the header above the column that you want to sort by. You can activate the Project Editor by double clicking on the title of the record.

(Add a new Project to the system)
This quick link that is located at the top of the project listing, allows you to easily add a new project to the system.

(Tickets) Tab
The Tickets tab provides a complete listing of all of the support tickets that are stored in the system and are not completed. The listing is sorted by entered date and displays the oldest items first and the newest items last. You can change the sorting of the listing by clicking on the header of any column. You can access the specific record by double clicking on the title of the items in the list.

(Report a problem with your system)
If you have located a bug with the operation of your system, this is the place to enter your report. If we determine that your issue is in fact a real bug with our software, your company will be credited for a portion of their regular bills. It is important to complete reports any time that you discover one so that our engineers can continue to perfect our software.

(Display the Service Ticket Report)
This quick link will activate the System Service Ticket and will report on all of the support tickets that are stored in the system. Support tickets are entered when a customer needs support of some type.

Demo Notification Area

Our software provides a 30 day free trial and demonstration period. During this 30 day period, your software will display tags throughout the system that indicate that the system is in Demo mode. When you license and register your software, this window will disappear.

Chapter #2 - Contact Management

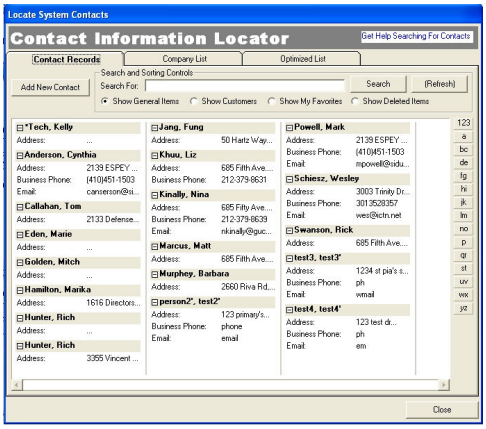
Contact Management is the core area and engine within the smart.Biz.Kit. Contact and Company information is the vital core of business and provides the information that you need to tie all of the supplemental contact information such as sales, accounting, statistics, and more. The smart.Biz.Kit provides some of the most advanced organizing and optimizing information management available on the market today.

This chapter details all of the functions and abilities of the CRM Contact Management engine.

Contact Information Locator

To get started with the Contact Management functions, we will need to be able to find records that are in the system. To begin any activity with the Contacts, you will need to click on the (Contacts) icon from the Main Top Menu of the system. This will open the Contact Information Locator with several tabs of information. Each of the tabs is explained below.

Contact Records Tab



The Contacts Records Tab provides the quickest and easiest way to locate general, favorite, and customer information. You can access any of the contact records that are listed in the display by double clicking on them. The controls on the screen function as follows:

(Add New Contact)
The Add New Contact button produces the Add New Contact interface that allows you to directly add a new contact to the system. After you are done entering the new contact, the system will take you to the contact editor tool as described below.

(Search) For Contacts
The Search for Contacts area is designed to allow you to enter keywords into the search box and the system will filter the results out for you. By entering a word into the Searching For input box, you can instantly search the entire Contact Management database for the information. When the search is taking place, the system searches the Company Name, the contacts first name and last name, the address of both the company and the contact, the city, the state, the zip code, the country, the phone number and the email address.

This advanced searching will help you locate information as fast as possible. For example: you can search for 21114 to locate records from a specific zip code. This will

also search both contacts and companies to that you truly have information that is tied to the zip code.

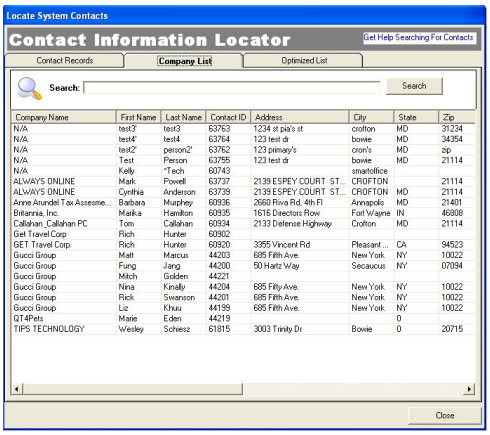
(Refresh) Search List
The Refresh button is designed to refresh the search results that are displayed on the screen. If you have changed the search options or the sorting tools, you can force the system to refresh the results list by clicking this button.

Search List Filters
The Search List Filters allow users to display current items, active favorites, active customers, or deleted items. Simply check off the view that you wish to display and the system will present only those records that you choose.

Search Alphabet Filters
The Alphabet Filters are located on the right side of this tab and allow users to sort through the records that are listed in the search results listing. By clicking on the letter, the cursor will be taken to the first record that starts with that letter.

Contact Information Records
The Contact Information records that are returned from the search and sorting criteria that you enter are displayed in the results are on the lower part of the control. The display will show the title of the company, the first and last name of the contact, and some additional information if it is present in the database for that record. Simply double click on the title for a contact record to activate the contact editor screen.

Company List Tab

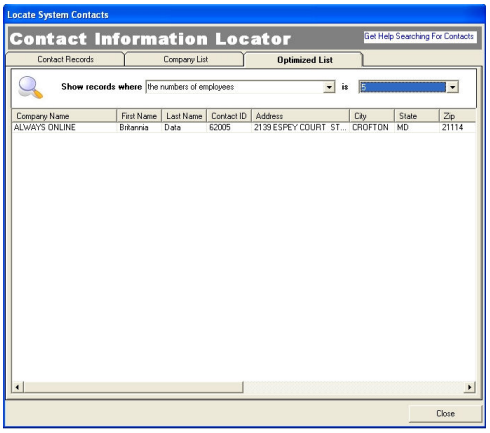


The Company List tab allows users to search and organize information by company instead of just contact information. The tab also provides advanced search functionality and a sort able result set on the bottom of the tab screen.

Contact Company Search
The company search tools on the top of the screen allow users to search the database of company information. It allows the search to go through the Company Name, the company address, city, state, and zip code, phone number, and email address.

Contact Record Listing Sorting
The results set that appears on the bottom of the Locator Tool, is fully sort able. You are able to easily sort any of the results by simply clicking on the title of the column that you wish to sort by. Simply double click on any record to open and activate the contact editor controls.

Optimized Prospect List Tab

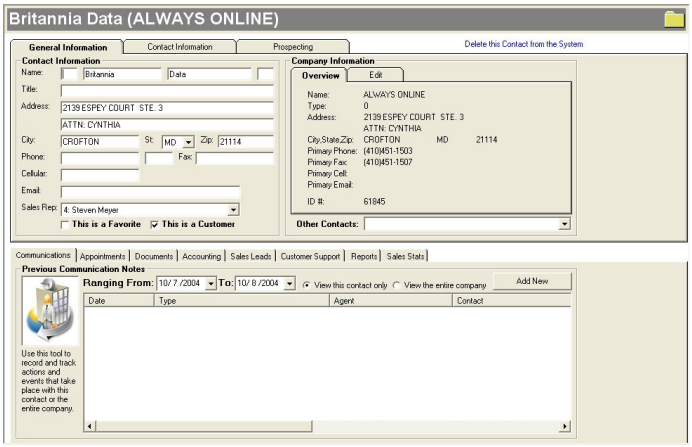


The Optimized Prospect List tab provides direct access to the contacts that you have stored in the system that have prospecting information answered about them. Using the prospecting tools, that are detailed in this chapter below, other users of the system can all contribute to getting strategic questions answered about each contact record in the system.

Once this information is entered into the a contacts record, the Optimized Prospect List allows you to view items that have specific answers. A good example for using this technology is as follows: You can configure one of the prospecting questions to be "What is the number of users at the company". As sales managers get prospecting tasks completed, this listing will report contacts that have the right number of users that you are looking for.

This tool is extremely useful if you have multiple divisions with different sales agents in each division. Sales Managers can easily profile their current contact records and then division managers can review the entire database to look for new opportunities from cross departments.

Contact Editing Tools



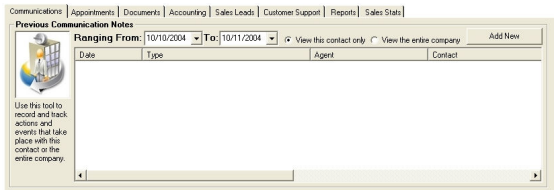
The Contacts Editing Tools were designed with the concept of finding information about a contact as easy as possible. There are numerous tools that are linked to the general information of the contact. These tools display information that is relative to the contact that you are viewing. The following is a description of each of the tools and sections that make up the Contacts Editor controls.

Company Information Tools

The Company Information tools provide both an Overview Tab and also an Edit tab. The Overview tab provides users with the company information to view only. The Edit tab allows users to change the information about the company or you can change the entire company itself.

There is also another control that allows you to just to other contact records form the same company. Pick any contact that you wish form the (Other Contacts) drop down control to quickly move to that record.

Communication Tracking Tools (Advanced Notes Management)



The Communication Tracking Tools are designed to be a next generation management engine for contact communication tracking. In the past, CRM systems simply provided a notes box for each contact record in the system. This notes box quickly became filled with all types of information, important and useless, and important information was quickly hidden from view by the useless information that simply cluttered the notes window.

Smart Technology developed an advanced way to store, track, and organize information about a company. Communication Notes are simply note records that are stored with a specific type of communication. You can, for example: store notes about a meeting that took place, or you could record each call attempt and information about the type of message that you left.

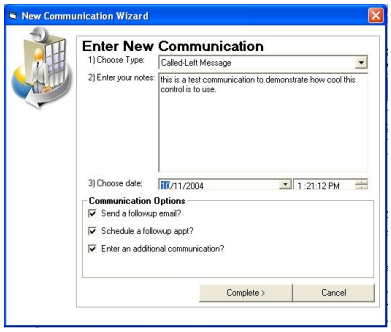
All of this information can then be viewed at a later time by you, or another member of your group. This immediately makes client management easy for multiple employees working on the same account as each employee can see when each other have communicated in one form or another with the client.

Many of the other functions in the system such as Schedule Management and Email Management automatically enter items into this listing when specific functions are triggered within their screens. This allows for easy tracking to see when and where they were sent or scheduled activity. The Communication Management window is the yellow brick road for a contacts history.

Date Range and Entire Company filter Options
When viewing the default results on the contacts editor, the system will limit the results to the past 24 hours of activity. You can however look at up to 2 years of history for a single client in our basic package or an unlimited number of years for our advanced package.

The filter options controls also provide you with the ability to view only the Communication records from this specific contact, or from the entire company that this contact is a member of. If you choose from the entire company, than any communication entry that is recorded from any contact that is a member of this company.

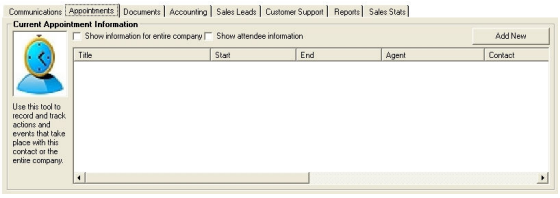
(Add New) Communication Button
The (add new) communication button allows you to enter a new communication to this specific contact record. Once this button is clicked, you will be presented with the New Communication Wizard window that will provide all of the controls that you require to record your note into the system with full information.



You can also add a new Communication Type quickly by using the <<Add New>> option from the Choose Type drop down. After choosing your Communication type, you can enter your notes into the notes area, then choose the date and the time that this communication took place. (Note: If you are recording a communication directly from an appointment, the system will configure the communication date and time to the end time of the appointment. You can still adjust these settings if you wish.

Before completing the process of adding a new communication, you can also choose to Send a follow-up email, Schedule a follow-up appointment, or Enter an additional communication. By checking any of these options, the system will automatically start these steps for you and will include the information from this communication to get the information ready. These steps can save you time.

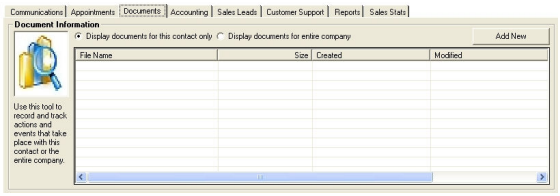
Contact Appointment Tracking



Every appointment that is scheduled in your smart.Biz.Kit has the ability to remember the participants of the appointment. These participants are all contact records and when you pull up that contact record in the system, you can see all of the appointments that are associated with them. This can be used for sales calls, service calls, and more.

You have the same ability to show records from the entire company or from just this contact alone. The (Add New) button will active the add new appointment window that is detailed in Chapter #4. To edit any of the appointments that appear in the list, simply double click on the title.

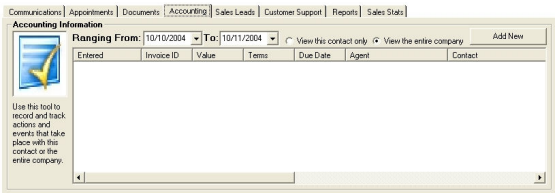
Document Management



The Document Management tools that are in the lower toolbar of the Contact Editor are designed to store documents that are relative to the contact record that you are currently viewing. You can link documents to this contact in this window by opening the Document Management tools as described in Chapter #5 and drag and drop any item from the Documents window to the Document Information window of the Contacts Editor.

The (Add New) button also activates the Document Management tool window and will display the available documents that can be linked to this contact. You also have the filtering ability of showing documents for this specific contact only or seeing the entire companies document list at once.

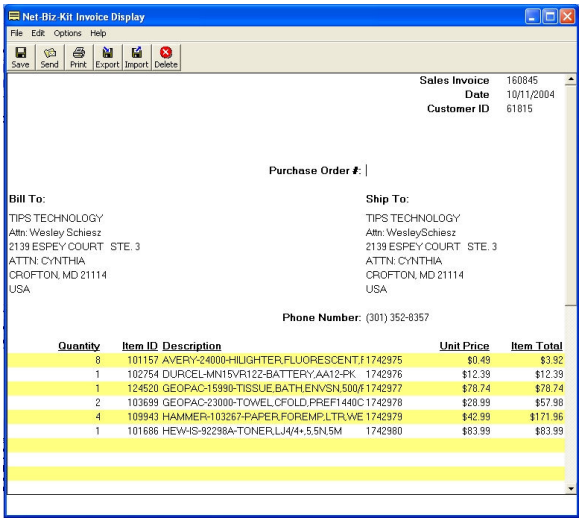
Accounting Management



The Accounting Management tools that are included with the Contact Editor tools, provide a listing of Invoices that are stored in the system. The (Range From) date range controls at the top of the display allow you to show invoices that were entered between those dates listed. You can also view invoices for this specific contact only, or any invoice for any contact that is a member of this company.

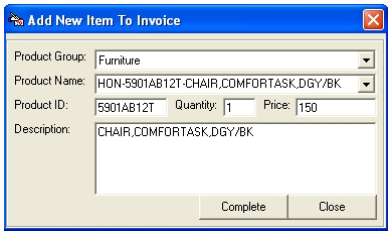
The (Add New) button will activate the Invoice Editing tool and create a new invoice. The Invoice editor tool is detailed below in better detail.

Invoice Editor Toolset



The Invoice Editor Toolset was designed to allow you to manage the information that is associated with the invoice and also to add and remove specific line items and products from the invoice to build the totals, billing, and shipping information.

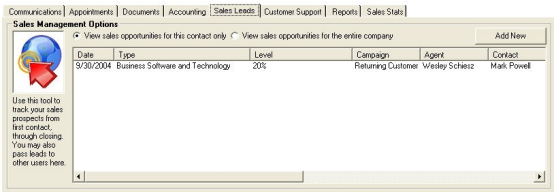
The Invoice Editor screen allows you to review previous invoices that are stored in the system and also allows you to edit and add additional products to the system. You also have the ability to print the invoice out to a standard printer, you can email the invoice out to another user, you can export the invoice or import the invoice to an XML data file.



Using the Product Management Tools

When you are using the Invoice Editor tools, you have the ability to add additional products to the Invoice. To begin adding products to an invoice, simply press (CTRL-N) to launch the product management console. This console will assist you in finding the specific product that you are looking for. It will also obtain the current available inventory and the price of the product. After you have located the product that you wish to add to the invoice, simply click on the (Complete) button to finish adding the product to the system.

Sales Lead and Opportunity Management

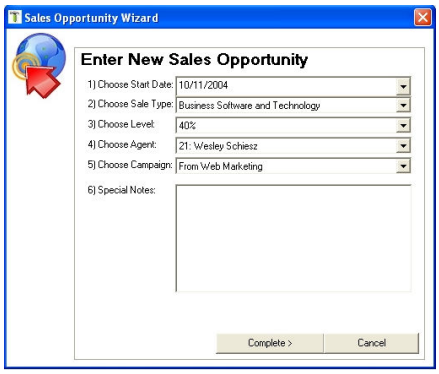

Communications Appointments Documents Accounting Sales Leads Customer Support Reports Sales Stats
Sales Management Options
View sales opportunities for this contact only
View sales opportunities for the entire company
Add New
Use this tool to track your sales prospects from first contact, through closing. You may also pass leads to other users here.
Date Type Level Campaign Agent Contact
9/30/2004 Business Software and Technology 20% Returning Customer Wesley Schiesz Mark Powell

One of the most important features of the smart.Biz.Kit system is the Sales Lead and Opportunity Management system. These functions help to make a sales managers life a lot easier and organized. By entering in your leads into the system, the smart.Biz.Kit will walk you through the process of prospecting, connecting, and completing your sales transactions with the highest accuracy.

Sales Managers can define way that the system operates, which allows Sales Employees to follow a precision plan that has worked for others. This work flow technology reduces training requirements for your new sales staff and provides a high level of communication between employee and management that normally was done through time consuming reports and phone calls.

Please read Chapter #3 for complete information on the Sales Management tools.

(Add New) Sales Lead Button


Sales Opportunity Wizard
Enter New Sales Opportunity
1) Choose Start Date: 10/11/2004
2) Choose Sale Type: Business Software and Technology
3) Choose Level: 40%
4) Choose Agent: 21: Wesley Schiesz
5) Choose Campaign: From Web Marketing
6) Special Notes:
Complete >
Cancel

You can activate the add new sales lead wizard by clicking on the (Add New) button. This tool provides you with all of the controls that you need to enter a sales lead into the system. You can store an unlimited number of sales leads under the same contact. The following information can be entered into a new Sales Lead.

Start Date: Allows you to choose the date at which this sales effort started. This is normally also the day that you determine a possibility of a sales with this contact.

Sale Type: Allows you to determine the type of sale this is. Sales Types help you divide company divisions, or product lines within a company. An administrator should setup the sales type descriptions in the administrative section. You can also use the <<Add New>> link that is located as the first item in the Sales Type drop down list to add a new Sales Type to the system rapidly.

Sales Level: Allows you to indicate the current progress level of this lead. Many companies configure their systems to use a 10, 20, 40, 60, 80, 90, 100% scale that defines the level that this sales has progressed to. 90 and 100% mean the prospect is in final contracting and legal or is already complete, but requires follow-up. 60 and 80% mean the prospect has received a presentation and a quote and a swing vote on how strong the sale manager thinks the chances of sale are. 20 and 40% mean prospect is in the initial stages of prospecting and researching.

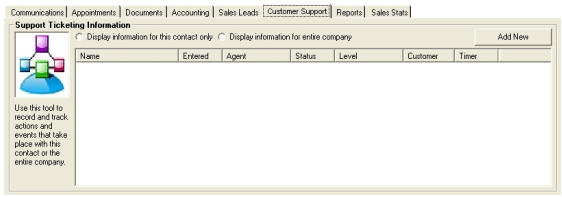
You can also use the <<Add New>> link that is located as the first item in the Sales Level drop down list to add a new Sales Level to the system rapidly.

Sales Agent: allows you to select the user that will be in charge of and responsible for the credit of this sale. This will indicate the item and all of its forecasting and tracking information will appear under this user.

Sales Campaign: allows you to indicate the Sales Campaign that this item can to the company from. The Sales Campaign tool can be used to track specific sales campaigns. Administrators should fill this drop down with any kind of specific marketing activity that is done so that you can view the actual success in forecasting and actual sales activity throughout the life of this sales lead.

Special Notes: Special Notes are used to store additional information about the sales lead record with the system. Whatever text is entered into this field will be appended to the Communication Record that is created when the lead is entered. This information is good in general to describe the actual sales angles, perspectives, and potential sales approach.

Customer Support and Issue Tracking



The Customer Support and Issue Tracking functions are designed to help track, identify, resolve, and reduce customer support issues. They also work to ensure communication between all users of the system so that remote agents can report accurately on the progress of an issue with accuracy instead of just guessing. Accuracy is key and communication is required in order for there to be accuracy.

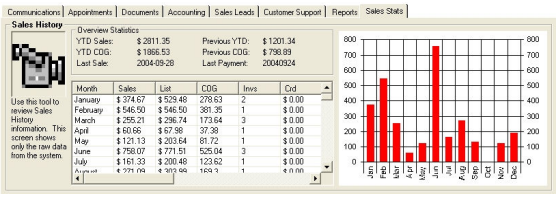
The Issue tracking capabilities of the smart.Biz.Kit allows you to record specific details about an issue and also allows you to assign the issue to other users within your group for resolution. You can automatically check on the status of the issue, without directly communicating with anyone else. For more information on the Support functions available, please read Chapter #7 of this manual.

Individual Contact Reports

The Contacts Editor currently provides access to only one report for specific contacts. In the near future, we will be adding additional reports to this section. To launch the report, simply click on the title on the report in the listing.

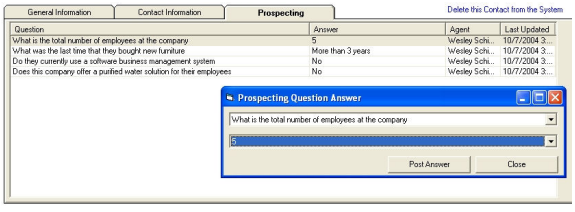
(Contact Overview and Comprehensive Information Report) – This report provides you with all of the contact information for a contact, along with all of the recent sales history information, prospecting questions and answers, recent appointments scheduled, recent communication records, and more. This single report is a complete printout of all the information that you could ever need while you are away from your computer.

Statistical Sales Information and Graphs


Communications
Appointments
Documents
Accounting
Sales Leads
Customer Support
Reports
Sales Stats
Sales History
Overview Statistics
YTD Sales: $ 2811.35
YTD COG: $ 1866.53
Last Sale: 2004-09-28
Previous YTD: $ 1201.34
Previous COG: $ 798.89
Last Payment: 20040924
Use this tool to review Sales History information. This screen shows only the raw data from the system.
Month
Sales
Last
COG
Invs
Cxl
January $ 374.67 $ 529.48 278.63 2 $ 0.00
February $ 546.50 $ 546.50 381.35 1 $ 0.00
March $ 255.21 $ 296.74 173.64 3 $ 0.00
April $ 60.66 $ 67.98 37.38 1 $ 0.00
May $ 121.13 $ 203.64 81.72 1 $ 0.00
June $ 758.07 $ 771.51 525.04 3 $ 0.00
July $ 161.33 $ 200.48 123.62 1 $ 0.00

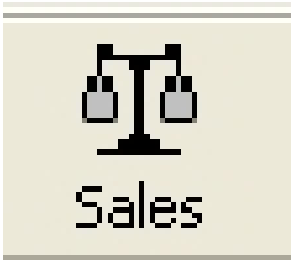
The statistical Sale Information and Graphs provide and overview in the recent sales history of the client. You can view patterns about buying habits and the success of specific marketing plans based on yearly sales. The information list also provides you wish in-depth monthly reporting on the client's sales activity.

Powerful Prospecting Tools



The prospecting tools that are in the Contact Editor toolset was designed to aggregate information about clients and store it for future analysis. When an administrator has configured the system with a set of questions that will appear on the screen you can double click any of the questions, the Prospecting Answer tool will appear and allow you to select the answer for the question. By answering these questions, a company can easily aggregate new business from every opportunity.

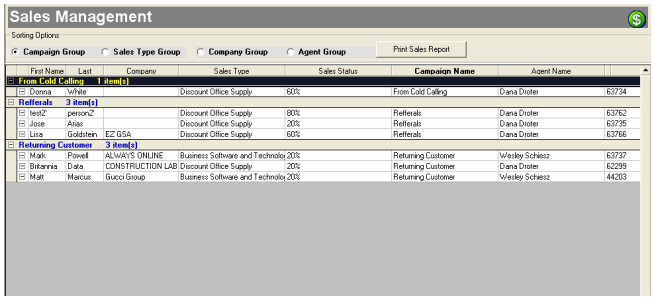
Chapter #3 - Sales Manager



The Sales Management engine that is included in the smart.Biz.Kit provides advanced assistance for tackling large or small sales projects. Sales require the highest level or accuracy and precision delivery. Sales Managers must be able to schedule appointments with easy and they need to always deliver on their word. The only way that this can happen is if they are "in the know" about every item on their client's accounts. The Sales Manager ensures that they do and also provides an easy way for individual employees to report forecasting goals, and current sales activity forecasting.

The smart.Biz.Kit Sales Manager organizes and monitors each sales opportunity and allows you to sort information reports in several different ways to provide an optimized reporting.

Sales Management Board


Sales Management
Sorting Options
Campaign Group
Sales Type Group
Company Group
Agent Group
Print Sales Report
First Name
Last
Company
Sales Type
Sales Status
Campaign Name
Agent Name
From Cold Calling 1 item(s)
Donna White Discount Office Supply 60% From Cold Calling Dana Droter 63734
Refferals 3 item(s)
test2 person2 Discount Office Supply 80% Refferals Dana Droter 63762
Jose Arias Discount Office Supply 20% Refferals Dana Droter 63735
Lisa Goldstein EZ GSA Discount Office Supply 60% Refferals Dana Droter 63766
Returning Customer 3 item(s)
Mark Powell ALWAYS ONLINE Business Software and Technolo 20% Returning Customer Wesley Schiesz 63737
Britannia Data CONSTRUCTION LAB Discount Office Supply 20% Returning Customer Dana Droter 62299
Matt Marcus Gucci Group Business Software and Technolo 20% Returning Customer Wesley Schiesz 44203

The Sales Management Board is a display screen that lists all of the Sales Opportunities for the system. There are 4 Sorting Options on the top of the screen that allow you to sort the results on the screen in several different ways.

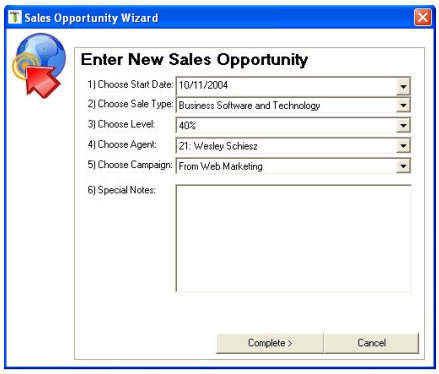
Campaign Group
Sorting by Campaign Group will list all of the items in groups by the Campaign that they are a member of.

Sales Type Group
Sorting by Sales Type will list all of the items in groups by the Sales Type that they each are a member of.

Company Group
Sorting by Company Group will list all of the items in groups by the Company name for each record. This is good for showing records that have multiple sales leads in different department or with different agents.

Agent Group
Sorting by the Agent Group will list the sales leads grouped by the agent that owns them. This is a good tool to use for looking at sales forecasting for an entire company or a division.

Sales Types


Sales Opportunity Wizard
Enter New Sales Opportunity
1) Choose Start Date: 10/11/2004
2) Choose Sale Type: Business Software and Technology
3) Choose Level: 40%
4) Choose Agent: 21: Wesley Schiesz
5) Choose Campaign: From Web Marketing
6) Special Notes:
Complete >
Cancel

Each Sales Lead Opportunity allows you to change the Sales Type. This setting can have different meanings for different companies. Administrators and system users can configure the sales types that they see fit. Many companies use this setting to separate different product lines, company divisions, or sales teams.

Sales Level / Status

The Sales Level status allows you to indicate what level this contact sales opportunity is currently at. All of the options of this selection are configurable in the administrative section of the system. Some sales managers have specific names for specific levels in their sales pipelines. These can be used as Sales Levels in the smart.Biz.Kit system and will indicate the current level.

Sales Agent

The Sales Agent selection allows you to choose the user that owns this contact. The owner of the sales lead is the agent that will receive all of the tracking credits for each of the activities that are tracked through the sales process. This can be changed at any time to a different user.

Campaign Management

Campaign Management allows you to track specific sales and marketing activities that you execute. For example, if you run a newspaper ad in a new paper, you can add that as a new campaign and then as leads and sales start coming in from new clients and sales, the smart.Biz.Kit automatically tracks the activity and reports on the success or failure of the campaign.

Sales Lead Report

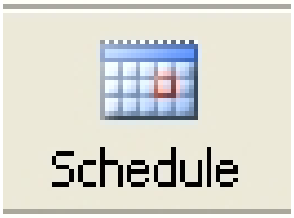
The Sales Lead Report provides a complete listing of the currently active sales leads that are stored in the system. The report can be activated from the Reports Sidebar Tool or from the top of the Sales Management Board.

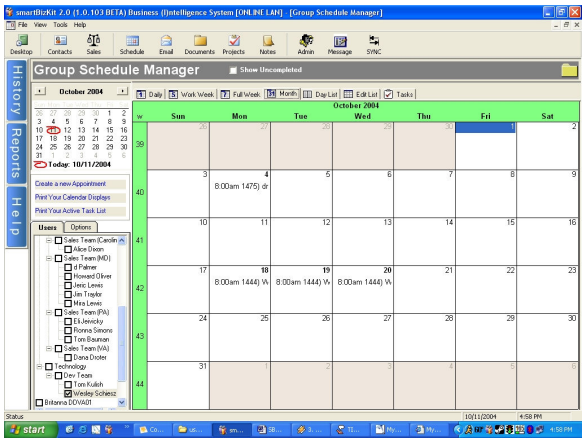
Sales Forecasting

This feature will be active in the system soon. Please check back to this manual in a future version to see a complete description of the Sales Forecasting Tools.

Chapter #4 - Schedule Manager

One of the most versatile tools in the smart.Biz.Kit is the Schedule Management engine that is a powerful group management solution that can organize and optimize operations and scheduling for an entire company.

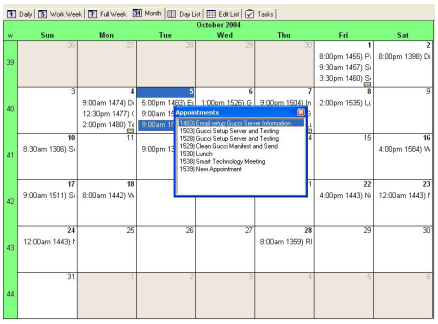




The system provides a group of different calendar view types that represent your groups schedule. In the lower left corner of the screen, you will see the Users List that will show you each of the users schedule on the screen at once.

Project Management Tasks and Time Tracking display is available on the main calendar. Below we have detailed each of the primary functions of the system.

Calendar Display Screen



The calendar display section provides several different views of your schedule information including Daily View, Work Week View, Full Week View, Month View, Edit List View, Day View, Task View. There is a tab set at the top of the screen that allows you to change to the different calendar views.

Each of the sections is detailed further down in this chapter. Please continue reading for complete information on each of the different view types.

Date Selection Control

The Date Selection control is located in the upper left corner of the calendar display screen. You can use this tool to navigate the main calendar display to a specific date. You can use the arrows in the upper right and left corners to jump to the next or the previous month. The date with the red circle around it is the current date.

Simply double click on the date to load that date into the main calendar. If you are viewing a weekly or monthly calendar, the date that you choose will default to the first date of the period that you selected. The Date Selection control always defaults to the current date when starting up.

Calendar Option Links

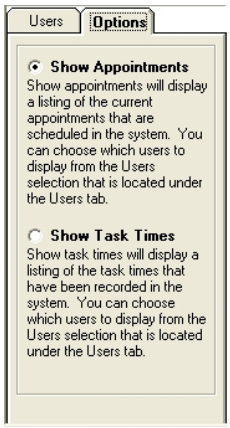
Located on the main calendar display, the Calendar Option Links give you quick access to creating a new appointment, starting the Calendar Print Manager, or the Active Task Report. To activate any of these, simply click on the title.

Calendar User Selection

The Calendar User Selection provides a list of all active members of your group system. Each agent is organized by company division and division team. You can place a check in the box next to the agents names that you want displayed on the calendar at the same time. You can click on the Team or Division titles in order to view all of the members under them.

Calendar Option Tools

The Calendar Options tools can be accessed by clicking on the (Options) Tab on the calendar screen. This tab provides you with two options (Show Appointments) and (Show Task Times).

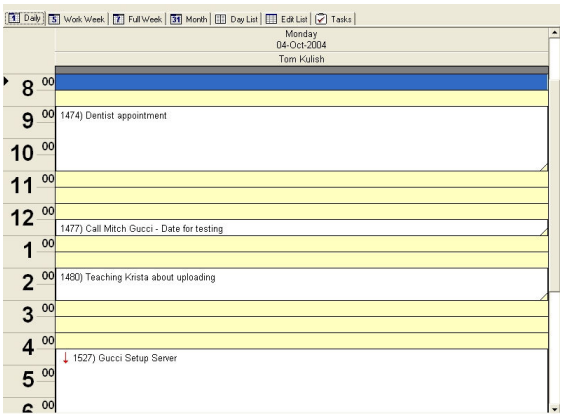

Users
Options
Show Appointments
Show appointments will display a listing of the current appointments that are scheduled in the system. You can choose which users to display from the Users selection that is located under the Users tab.
Show Task Times
Show task times will display a listing of the task times that have been recorded in the system. You can choose which users to display from the Users selection that is located under the Users tab.

Show Appointments – will display a listing of the current appointments that are scheduled in the system. You can choose which users to display from the Users selection that is located under the Users tab.

Show Task Times – will display a listing of the task times that have been recorded in the system. You can choose which to display from the Users selection that is located under the Users tab.

After changing this option, you will be able to view either appointments on your calendar or a listing of task times that have been recorded for tasks in the Project Management system. You will be able to use any of the standard views to display your task times history.

Daily Calendar Screen



The Daily Calendar Screen displays only a single days worth of appointments on the screen at once. The screen is scrollable and begins at midnight and continues until midnight the next morning. You can move to a different day by using the Date Selector control on the left of the calendar.

Create an Appointment – to create a new appointment simply left click on the start time that you want the appointment to begin and hold the mouse button and drag the mouse to the end time while holding the mouse button. When you let go of the mouse button, the system will create a new appointment and allow you to edit it.

You can also create an appointment at any time by clicking on the (Add a New Appointment) link that is located on the left side of the calendar screen.

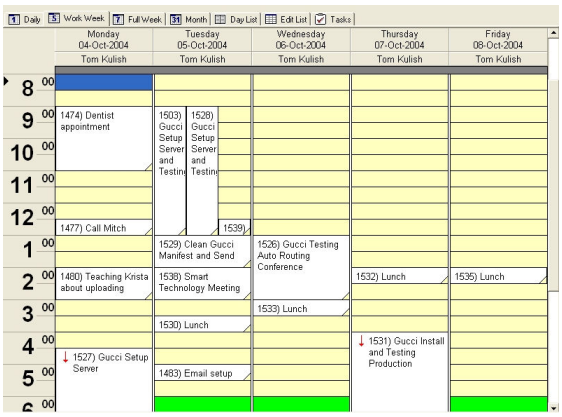
Edit an Appointment – to edit an appointment that is already stored in the system, simply double click on the title of the appointment on the screen and the appointment editor will appear. The appointment editor is described in detail later in this chapter. Please read on to get a full description.

Delete an Appointment – to delete an appointment from the calendar, simply click once on the appointment and then press the Delete button on your keyboard. You will be prompted before the item is deleted. You can also delete an appointment by clicking on the X delete button on the appointment editor.

Copy an Appointment – to copy an appointment from the calendar, simply hold down on the control key on your keyboard (CTRL) and then click on the appointment that you want to copy and drag it to another time. You will be prompted before the copy of the appointment is saved on your screen.

Move an Appointment – to move an appointment on your calendar, simply click and drag the appointment from one time to another. If you want to change the duration of the appointment, simply click on the bottom of the appointment and then reduce the size of the appointment. You can also increase the size of the appointment using this technique.

Work Week Calendar Screen



The Work Week Calendar Screen displays a full five day weeks worth of appointments on the screen at once. The screen is scrollable and begins at midnight and continues until midnight the next morning. You can move to a different week by using the Date Selector control on the left of the calendar.

Using this calendar view, you can view multiple users on the screen at one time. For each user that you select from the left menu and place a check next to their name, a new column will appear for each day with their name on the top of it.

Create an Appointment – to create a new appointment simply left click on the start time that you want the appointment to begin and hold the mouse button and drag the mouse to the end time while holding the mouse button. When you let go of the mouse button, the system will create a new appointment and allow you to edit it.

You can also create an appointment at any time by clicking on the (Add a New Appointment) link that is located on the left side of the calendar screen.

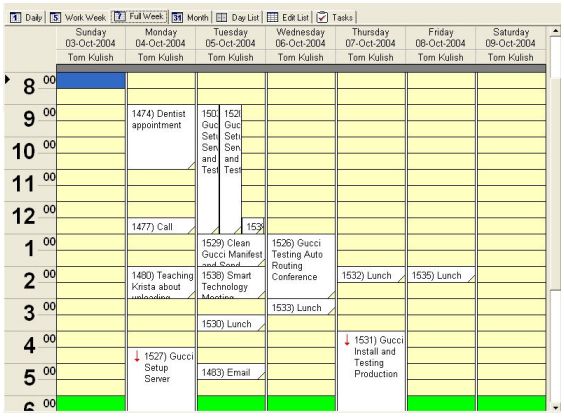
Edit an Appointment – to edit an appointment that is already stored in the system, simply double click on the title of the appointment on the screen and the appointment editor will appear. The appointment editor is described in detail later in this chapter. Please read on to get a full description.

Delete an Appointment – to delete an appointment from the calendar, simply click once on the appointment and then press the Delete button on your keyboard. You will be prompted before the item is deleted. You can also delete an appointment by clicking on the X delete button on the appointment editor.

Copy an Appointment – to copy an appointment from the calendar, simply hold down on the control key on your keyboard (CTRL) and then click on the appointment that you want to copy and drag it to another time. You will be prompted before the copy of the appointment is saved on your screen.

Move an Appointment – to move an appointment on your calendar, simply click and drag the appointment from one time to another. If you want to change the duration of the appointment, simply click on the bottom of the appointment and then reduce the size of the appointment. You can also increase the size of the appointment using this technique.

Full Week Calendar Screen



The Full Week Calendar Screen displays a full seven day weeks worth of appointments on the screen at once. The screen is scrollable and begins at midnight and continues until midnight the next morning. You can move to a different day by using the Date Selector control on the left of the calendar.

Using this calendar view, you can view multiple users on the screen at one time. For each user that you select from the left menu and place a check next to their name, a new column will appear for each day with their name on the top of it.

Create an Appointment – to create a new appointment simply left click on the start time that you want the appointment to begin and hold the mouse button and drag the mouse to the end time while holding the mouse button. When you let go of the mouse button, the system will create a new appointment and allow you to edit it.

You can also create an appointment at any time by clicking on the (Add a New Appointment) link that is located on the left side of the calendar screen.

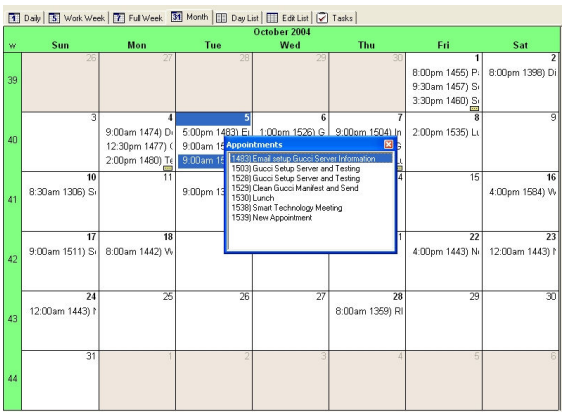
Edit an Appointment – to edit an appointment that is already stored in the system, simply double click on the title of the appointment on the screen and the appointment editor will appear. The appointment editor is described in detail later in this chapter. Please read on to get a full description.

Delete an Appointment – to delete an appointment from the calendar, simply click once on the appointment and then press the Delete button on your keyboard. You will be prompted before the item is deleted. You can also delete an appointment by clicking on the X delete button on the appointment editor.

Copy an Appointment – to copy an appointment from the calendar, simply hold down on the control key on your keyboard (CTRL) and then click on the appointment that you want to copy and drag it to another time. You will be prompted before the copy of the appointment is saved on your screen.

Move an Appointment – to move an appointment on your calendar, simply click and drag the appointment from one time to another. If you want to change the duration of the appointment, simply click on the bottom of the appointment and then reduce the size of the appointment. You can also increase the size of the appointment using this technique.

Monthly Calendar Screen



The Monthly Calendar Screen displays an entire month worth of appointments on the screen at once. If there are too many appointments on a single day, the screen will display a small button that will open a popup window with a full listing of appointments for the day. You can move to a different day by using the Date Selector control on the left of the calendar.

Using this calendar view, you can view multiple users on the screen at one time. For each user that you select from the left menu and place a check next to their name, a new column will appear for each day with their name on the top of it.

Create an Appointment – in this calendar view you can only create an appointment by clicking on the (Add a New Appointment) link that is located on the left side of the calendar screen.

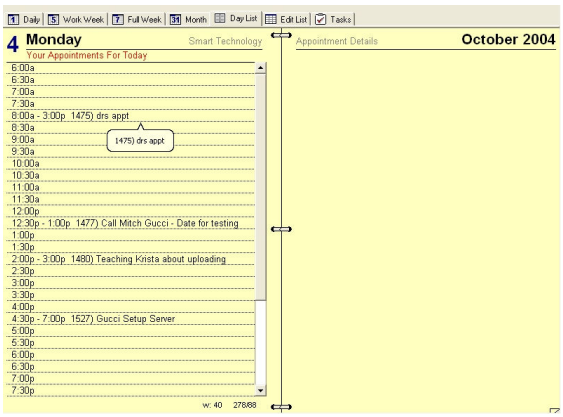
Edit an Appointment – to edit an appointment that is already stored in the system, simply double click on the title of the appointment on the screen and the appointment editor will appear. The appointment editor is described in detail later in this chapter. Please read on to get a full description.

Delete an Appointment – to delete an appointment from the calendar, simply click once on the appointment and then press the Delete button on your keyboard. You will be prompted before the item is deleted. You can also delete an appointment by clicking on the X delete button on the appointment editor.

Copy an Appointment – to copy an appointment from the calendar, simply hold down on the control key on your keyboard (CTRL) and then click on the appointment that you want to copy and drag it to another time. You will be prompted before the copy of the appointment is saved on your screen.

Move an Appointment – to move an appointment on your calendar, simply click and drag the appointment from one date to another. If you want to change the duration of the appointment, simply click on the bottom of the appointment and then reduce the size of the appointment. You can also increase the size of the appointment using this technique.

Day List Calendar Screen



The Day List Calendar Screen displays only a single days worth of appointments on the screen at once. The screen is scrollable and begins at midnight and continues until midnight the next morning. You can move to a different day by using the Date Selector control on the left of the calendar.

Create an Appointment – in this calendar view you can only create an appointment by clicking on the (Add a New Appointment) link that is located on the left side of the calendar screen.

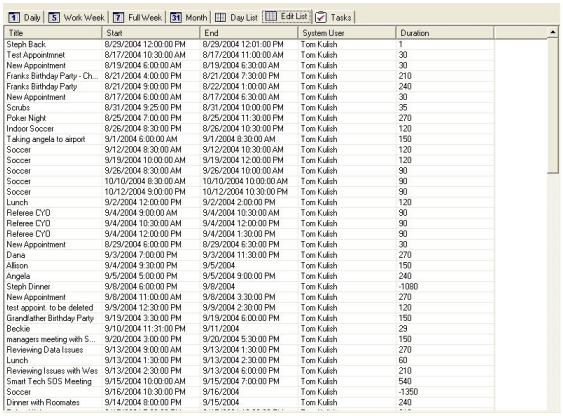
Edit an Appointment – to edit an appointment that is already stored in the system, simply double click on the title of the appointment on the screen and the appointment editor will appear. The appointment editor is described in detail later in this chapter. Please read on to get a full description.

Delete an Appointment – to delete an appointment from the calendar, simply click once on the appointment and then press the Delete button on your keyboard. You will be prompted before the item is deleted. You can also delete an appointment by clicking on the X delete button on the appointment editor.

Copy an Appointment – to copy an appointment from the calendar, simply hold down on the control key on your keyboard (CTRL) and then click on the appointment that you want to copy and drag it to another time. You will be prompted before the copy of the appointment is saved on your screen.

Move an Appointment – to move an appointment on your calendar, simply click and drag the appointment from one time to another. If you want to change the duration of the appointment, simply click on the bottom of the appointment and then reduce the size of the appointment. You can also increase the size of the appointment using this technique.

Edit List Calendar Screen



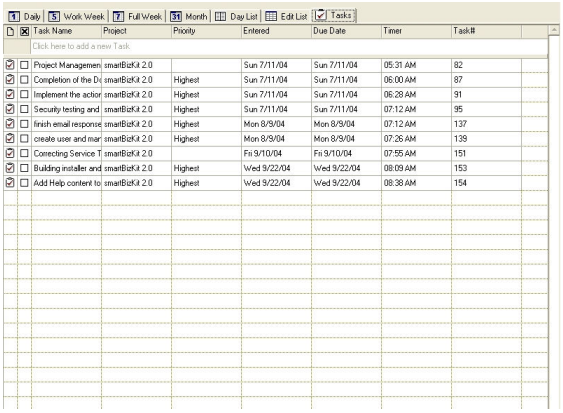
Title	Start	End	System User	Duration
Steph Back	8/29/2004 12:00:00 PM	8/29/2004 12:01:00 PM	Tom Kulish	1
Test Appointmnet	8/17/2004 10:30:00 AM	8/17/2004 11:00:00 AM	Tom Kulish	30
New Appointment	8/19/2004 6:00:00 AM	8/19/2004 6:30:00 AM	Tom Kulish	30
Franks Birthday Party - Ch...	8/21/2004 4:00:00 PM	8/21/2004 7:30:00 PM	Tom Kulish	210
Franks Birthday Party	8/21/2004 9:00:00 PM	8/22/2004 1:00:00 AM	Tom Kulish	240
New Appointment	8/17/2004 6:00:00 AM	8/17/2004 6:30:00 AM	Tom Kulish	30
Scrubs	8/31/2004 9:25:00 PM	8/31/2004 10:00:00 PM	Tom Kulish	35
Poker Night	8/25/2004 7:00:00 PM	8/25/2004 11:30:00 PM	Tom Kulish	270
Indoor Soccer	8/26/2004 8:30:00 PM	8/26/2004 10:30:00 PM	Tom Kulish	120
Taking angela to airport	9/1/2004 6:00:00 AM	9/1/2004 8:30:00 AM	Tom Kulish	150
Soccer	9/12/2004 8:30:00 AM	9/12/2004 10:30:00 AM	Tom Kulish	120
Soccer	9/19/2004 10:00:00 AM	9/19/2004 12:00:00 PM	Tom Kulish	120
Soccer	9/26/2004 8:30:00 AM	9/26/2004 10:00:00 AM	Tom Kulish	90
Soccer	10/10/2004 8:30:00 AM	10/10/2004 10:00:00 AM	Tom Kulish	90
Soccer	10/12/2004 9:00:00 PM	10/12/2004 10:30:00 PM	Tom Kulish	90
Lunch	9/2/2004 12:00:00 PM	9/2/2004 2:00:00 PM	Tom Kulish	120
Referee CYO	9/4/2004 9:00:00 AM	9/4/2004 10:30:00 AM	Tom Kulish	90
Referee CYO	9/4/2004 10:30:00 AM	9/4/2004 12:00:00 PM	Tom Kulish	90
Referee CYO	9/4/2004 12:00:00 PM	9/4/2004 1:30:00 PM	Tom Kulish	90
New Appointment	8/29/2004 6:00:00 PM	8/29/2004 6:30:00 PM	Tom Kulish	30
Dana	9/3/2004 7:00:00 PM	9/3/2004 11:30:00 PM	Tom Kulish	270
Allison	9/4/2004 9:30:00 PM	9/5/2004	Tom Kulish	150
Angela	9/5/2004 5:00:00 PM	9/5/2004 9:00:00 PM	Tom Kulish	240
Steph Dinner	9/8/2004 6:00:00 PM	9/8/2004	Tom Kulish	-1080
New Appointment	9/8/2004 11:00:00 AM	9/8/2004 3:30:00 PM	Tom Kulish	270
test appoint. to be deleted	9/9/2004 12:30:00 PM	9/9/2004 2:30:00 PM	Tom Kulish	120
Grandfather Birthday Party	9/19/2004 3:30:00 PM	9/19/2004 6:00:00 PM	Tom Kulish	150
Beckie	9/10/2004 11:31:00 PM	9/11/2004	Tom Kulish	29
managers meeting with S...	9/20/2004 3:00:00 PM	9/20/2004 5:30:00 PM	Tom Kulish	150
Reviewing Data Issues	9/13/2004 9:00:00 AM	9/13/2004 1:30:00 PM	Tom Kulish	270
Lunch	9/13/2004 1:30:00 PM	9/13/2004 2:30:00 PM	Tom Kulish	60
Reviewing Issues with Wes	9/13/2004 2:30:00 PM	9/13/2004 6:00:00 PM	Tom Kulish	210
Smart Tech SOS Meeting	9/15/2004 10:00:00 AM	9/15/2004 7:00:00 PM	Tom Kulish	540
Soccer	9/16/2004 10:30:00 PM	9/16/2004	Tom Kulish	-1350
Dinner with Roomates	9/14/2004 8:00:00 PM	9/15/2004	Tom Kulish	240

The Edit List Calendar Screen displays all of the currently active appointments on the screen at once. The screen is scrollable and sort able by any of the column headers. You can move to a different day by using the Date Selector control on the left of the calendar.

Create an Appointment – in this calendar view you can only create an appointment by clicking on the (Add a New Appointment) link that is located on the left side of the calendar screen.

Edit an Appointment – to edit an appointment that is already stored in the system, simply double click on the title of the appointment on the screen and the appointment editor will appear. The appointment editor is described in detail later in this chapter. Please read on to get a full description.

Task List Management Screen



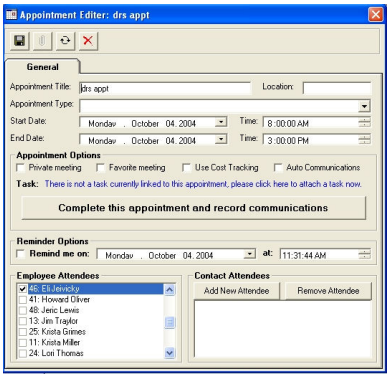
The Task List Management Screen displays all of the active tasks on the screen at once. You can sort your screen in several different styles in order to organize the information the way that you need to see it.

Create a Task – to create a new task simply enter in the information at the top of the task list and hit enter. It is important that you spell the project name exactly the same or you will create different projects in the system.

Edit a Task – to edit a task that is already stored in the system, simply double click on the title of the task on the screen and the task editor will appear. The task editor is described in detail later in the Project Management chapter. Please read on to get a full description.

Delete a Task – to delete a task from the calendar, simply place a check in the checkbox that is located to the left side of the title of the ticket in the system. This will remove the task from your screen.

Appointment Editing Tools



The appointment editing tools were designed to provide advanced features for storing and editing your scheduled appointments. The appointment editor stores all of the information about an appointment and it attendee information.

General Appointment Tab

The General Appointment Tab is the primary tab of the appointment editor and provides all of the primary functions that you need to get the most from your group schedule. The following is a description of each of the information fields on the editor screen.

Title: The title of the appointment as it will be displayed on the calendar and printouts.

Location: The location of the appointment. This is normally used to indicate the physical location of the appointment, but in many cases companies are using this field to indicate web meetings as well.

Type: The type of appointment that this is. You can add additional types by using the <<Add New>> Quick Add link that is in the appointment type drop down.

Start Date and End Date: The start and end date of the appointment itself. You must set both the date and time for both the start and end date in order for this appointment to appear on your calendar.

Private Meeting: Indicates if this meeting is a private meeting where it will only be viewable by the owner if it is.

Favorite Meeting: Indicated if this meeting is a favorite meeting or not.

Use Cost Tracking: Cost tracking tools allow you to create an invoice for this appointment and place specific charges for this appointment.

Auto Communications: If this is checked, the system will automatically create communication records for specific events that transpire with this appointment.

Task Link: The task link allows you to link a task to the appointment. You can achieve this by clicking on the link to add a new task. Then select the task from the list of currently active system tasks to link it to the appointment.

Complete Appointment Button: The Complete Appointment button allows you to complete the appointment. In order to complete this process of completing your appointment, you will need to enter a communication record pertaining to this appointment. Please read about the communication records in the previous chapter.

Remind Me Option: If this is checked, then the system will provide you both an automatic email on the morning of the appointment, and also a popup computer window will prompt you exactly at the date and time that specify in the Remind Me Date.

Remind Me Date: This is the date and time that you want to receive your reminder.

Employee Attendees: The Employee Attendees controls are designed to allow you to schedule a single appointment for as many of the system users as you want to. By simply adding a check next to the agent's name, an appointment is automatically scheduled on their calendar.

Contact Attendees: This control lists all of the contacts that will be attending this appointment. By adding a contact to the list, this appointment will appear under their contact record.

Notes Appointment Tab

This feature will be available on a future version that will be released soon. Please check back soon for more information.

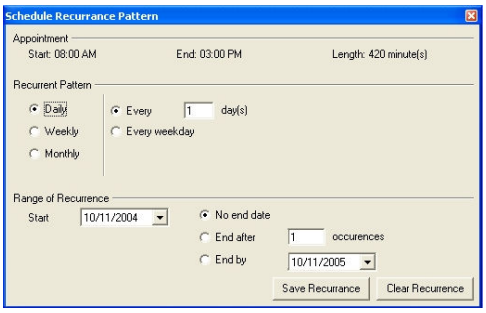
Agenda Management Tab

This feature will be available on a future version that will be released soon. Please check back soon for more information.

Billing Management Tab

This feature will be available on a future version that will be released soon. Please check back soon for more information.

Appointment Recurrence Manager



If your appointment will have a recurring schedule, you can configure the appointments recurring properties by clicking on the recurrence button on the top of the appointment editor. The recurrence manager provides advanced scheduling controls that allow you to configure the pattern and the range of your recurrence. Once you are finished configuring your options, you can click the Save Recurrence button to save the pattern to the appointment. Once a recurrence pattern has been safely recorded, the appointment editor will display a yellow notice at the top of the editing controls.

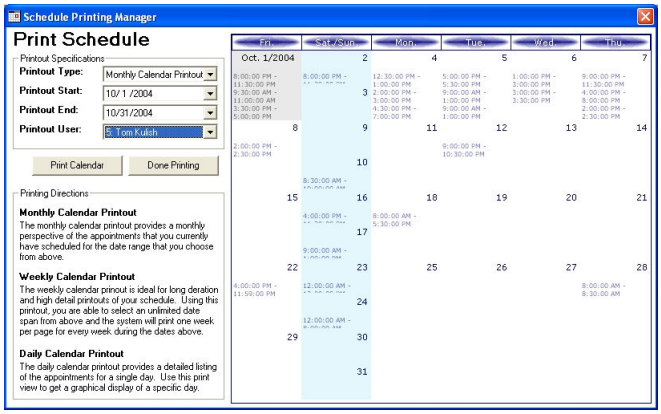
Calendar Printing Manager

When we designed the smart.Biz.Kit system, we knew that one of the biggest needs from CRM were powerful scheduling printing functionality. These functions become one of the most used tools in the entire system as remote workers frequently use these scheduling reports to record their entire activities with a pen while on the go. They then bring these reports home and record the information back into the smart.Biz.Kit for safe keeping.

The following is a description of the printing manager functions. You can activate the Printing Manager by clicking on the (Print Calendar Display) from the calendar screen.

Monthly Calendar Report

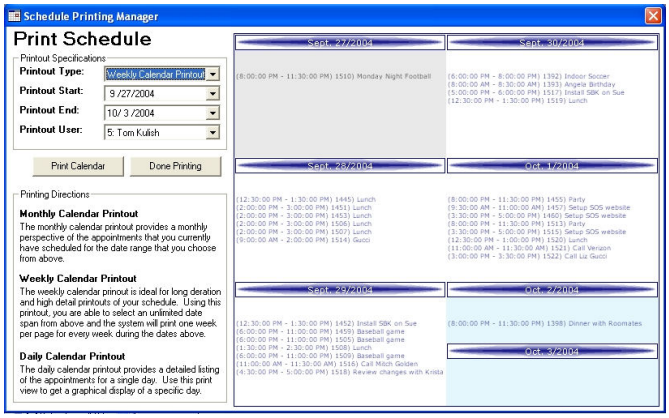
The Monthly Calendar report provides an overview of the appointments that that are in the system for the selected user on the left side of the screen.


Schedule Printing Manager
Print Schedule
Printout Specifications
Printout Type: Monthly Calendar Printout
Printout Start: 10/ 1 /2004
Printout End: 10/31/2004
Printout User: 5: Tom Kulish
Print Calendar
Done Printing
Printing Directions
Monthly Calendar Printout
The monthly calendar printout provides a monthly perspective of the appointments that you currently have scheduled for the date range that you choose from above.
Weekly Calendar Printout
The weekly calendar prinout is ideal for long deration and high detail printouts of your schedule. Using this printout, you are able to select an unlimited date span from above and the system will print one week per page for every week during the dates above.
Daily Calendar Printout
The daily calendar printout provides a detailed listing of the appointments for a single day. Use this print view to get a graphical display of a specific day.
Fri
Sat / Sun
Mon
Tue
Wed
Thu
Oct. 1/2004

The monthly calendar printout will only print on a single page and will automatically format to fit almost any printer on the market.

Weekly Calendar Report

The Weekly Calendar report provides a wide set of boxes for each day of a seven day week. This printout is the most effective printout for sales managers and users that travel without a laptop computer.

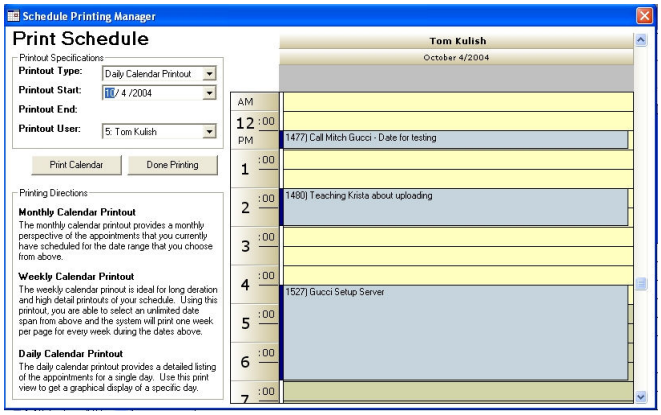

Schedule Printing Manager
Print Schedule
Printout Specifications
Printout Type: Weekly Calendar Printout
Printout Start: 9 /27/2004
Printout End: 10/ 3 /2004
Printout User: 5: Tom Kulish
Print Calendar
Done Printing
Printing Directions
Monthly Calendar Printout
The monthly calendar printout provides a monthly perspective of the appointments that you currently have scheduled for the date range that you choose from above.
Weekly Calendar Printout
The weekly calendar prinout is ideal for long deration and high detail printouts of your schedule. Using this printout, you are able to select an unlimited date span from above and the system will print one week per page for every week during the dates above.
Daily Calendar Printout
The daily calendar printout provides a detailed listing of the appointments for a single day. Use this print view to get a graphical display of a specific day.
Sept. 27/2004
Sept. 30/2004
Sept. 28/2004
Oct. 1/2004
Sept. 29/2004
Oct. 2/2004
Oct. 3/2004

Weekly view provides the most space of any of the calendar reports and can also print multiple pages for full month span printing.

Daily Calendar Report

The Daily Calendar Report provides you with a detailed display of all of the appointments for a single day. This printout gives you as much detail as possible for appointments within the system.

If you are using a color printer, the daily calendar report will be printed with high quality clarity.


Schedule Printing Manager
Print Schedule
Printout Specifications
Printout Type:
Daily Calendar Printout
Printout Start:
/ 4 /2004
Printout End:
Printout User:
5: Tom Kulish
Print Calendar
Done Printing
Printing Directions
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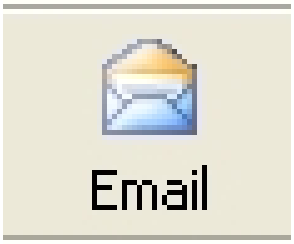
The weekly calendar pinout is ideal for long deration and high detail printouts of your schedule. Using this printout, you are able to select an unlimited date span from above and the system will print one week per page for every week during the dates above.
Daily Calendar Printout
The daily calendar printout provides a detailed listing of the appointments for a single day. Use this print view to get a graphical display of a specific day.
Tom Kulish
October 4/2004
AM
12 :00
PM
1 :00
2 :00
3 :00
4 :00
5 :00
6 :00
7 :00
1477) Call Mitch Gucci - Date for testing
1490) Teaching Krista about uploading
1527) Gucci Setup Server

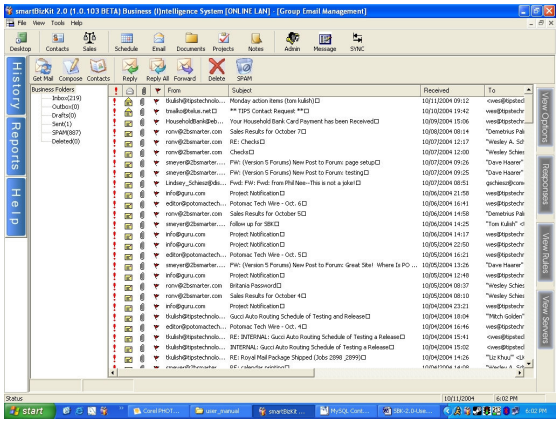
Calendar Overview Report

The Calendar Overview Report provides you with a monthly listing of your appointments, along with a listing of the tasks that you have active in the system. This combination report is designed to be used as a consolidated appointment / task report.

Chapter #5 - Email Manager



The Email Manager that is integrated into the smart.Biz.Kit was designed to be an easy to use alternative to other email clients that are on the market. Due to the fact that these email tools are integrated into your business management system, we have the ability to reduce SPAM by over 95% on every mailbox that uses the smart.Biz.Kit.



Our anti SPAM controls work to not only deflect incoming messages that have bad content, but we will protect it by not allowing messages from users that do not have contact records in the system for. If a users or an email address is not on this white list, then the smart.Biz.Kit servers automatically respond to the email to get them to authenticate the message. If it is a real person that is trying to reach you for any reason, they will be also to answer a simple question to authenticate their identity and then the email will be passed to your inbox.

The main advantage to this type of system is that Spammers cannot reply to authentication messages. So these emails are restricted and locked out of the system and only good messages are sent to your inbox.

Main Email Toolbar

The Main Email Toolbar is located at the top of the email controls. This toolbar provides the ability to perform the primary functions of the email section from one place. This toolbar will sometimes change to provide users with the reverse operation such as Un-Delete and Not-SPAM which reverse their respective counterparts.

Get Mail

The Get Mail button starts the sync engine and checks for and downloads only the email data.

Compose

The Compose button will launch the email creator tools and will allow you to send an email to an email address.

Contacts

The Contacts button will launch the Contacts Locator control. Using this tool, you will be able to drag and drop contact information from the Contacts Locator to the Email screens to apply the contact information to the record that you are currently editing.

Reply

The Reply button will create a new email record and will use all of the information from the current record or the highlighted record.

Reply All

The Reply All button is the same as the Reply button, but it replies to everyone from the original email message.

Forward

The Forward button will forward the current or currently selected email record to the address that you designate.

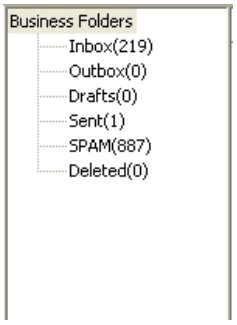
Delete

The Delete button will remove the record from the current folder and place it in the Deleted folder. If the record that you are deleting is in the deleted folder, then it will be removed from the system entirely.

SPAM

The SPAM button indicates that the current or selected item is a SPAM message. This will move the message to the SPAM folder and will not allow any future messages from this sender to arrive.

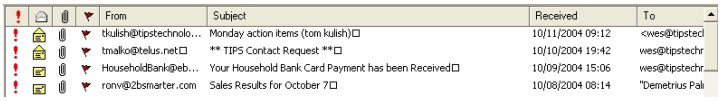
Folder Management



The folder management window provides access to each of the primary folders in the system. Next to each of the folders is a count of the total number of items in each folder. To view the items that are stored in a specific folder, simply click on the folder name to highlight it and the messages will appear in the Message Listing Manager as detailed below.

Message Listing Manager

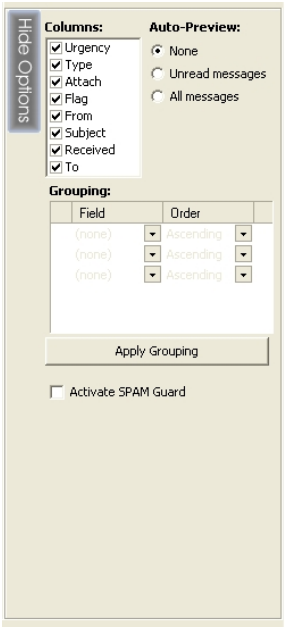
The Message Listing Manager provides a range of information about each of the emails that are located in the specific folder that you are viewing. You can use your mouse



arrow keys to scroll through your messages, or you can use the mouse to select records from the list. Double click or press enter while a message is highlighted to activate the email viewer.

Email Sidebar Tools

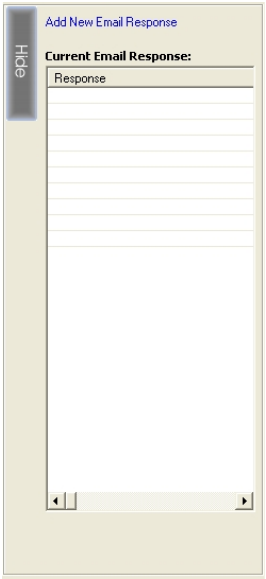
The Email Sidebar tools are located on the right side of the main email screen, immediately to the right of the message listing window. The sidebar toolset provides 4 of the most commonly used functions for the main system. You can click on the title of any of the buttons to display the contents of the hidden toolset. Each of the toolbars is detailed below:



View Options

The (View Options) button provides you with all of the controls that manage the display of messages in the main message list window. The Columns option allows you to check off the columns that you want to have listed in the display. The Auto-preview option allows you to toggle on and off the message preview pain under each message title.

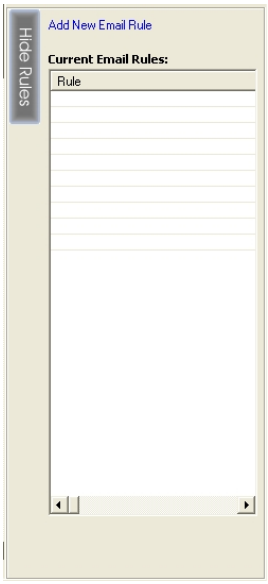
The grouping controls allow you to group the results in any way that you wish. This is extremely helpful for finding and working with specific groups of emails.



Responses

The responses tab activates the Response engine controls. Responses are saved email response templates. You can add a new response by clicking on the (Add New Email Response) link on the top of the control.

All of the items that you have stored will be available in the response list. If you wish to use one of the items in you email that you are composing, simply drag the title to the compose window and the template text will be inserted.

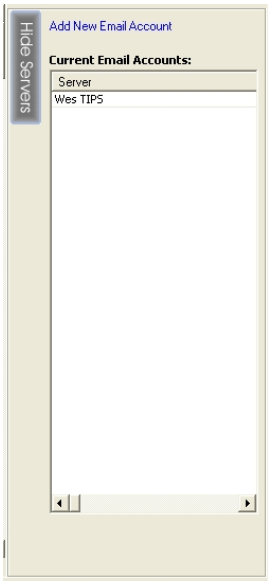


View Rules

The View Rules tab displays the incoming email filter rules. These rules are applied to all incoming emails and allow you to control where messages are delivered in your folders.

An example of this technology is when you have a rule configured to deliver and message that has Urgent in the title, place it in the (Urgent) folder. You can even have emails forwarded to another email address using the rules engine.

Click the (Add New Email Rule) link to activate the new email rule wizard.



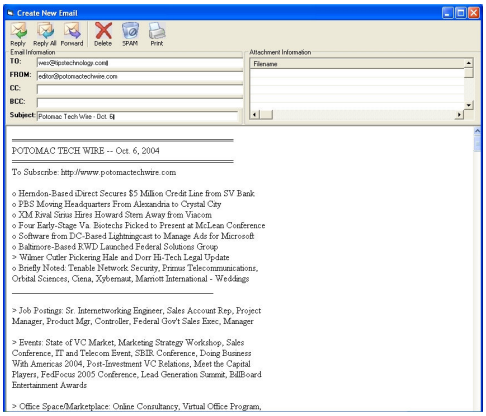
View Servers

The View Servers tab provides access to the backend management of the email accounts that stored and manage all of the message delivery. These accounts can be remotely configured by your groups system administrator or you can manage your own settings using this control panel.

Click (Add New Email Account) to activate the new email account wizard. This wizard will walk you through creating a new account and assigning the correct settings.

You can edit any of the email account settings by simply double clicking on the name of the server from the Current Email Accounts listing. After clicking this, you will see a popup window that will allow you to edit all of the email account settings. You can simply adjust any of the settings that you see to fit your needs.

Email Viewer / Editor



The Email Viewer / Editor is designed to allow you to read, reply to, forward, print, or delete you email messages that are stored in your system. The viewer is capable of displaying HTML and text messages and provides a full set of tools for managing message attachments.

The Anti-SPAM controls are available from the top toolbar by providing the SPAM button. If you are reading a message and you think that it is SPAM, simply click the SPAM button and the message is sent to the SPAM folder. Any future messages with this sender or this title will be blocked out from your inbox.

To reply to the message that you are reading, simply click Reply To, Reply To All, or Forward and the interface will convert to the tools that you need.

Smart SPAM Filtering

The Smart SPAM Filtering system was designed to be the ultimate solution to SPAM messages in the corporate environment. Our system links your corporate contact manager and your email client together so that you Contact list and credentials become your email engine “white list”. This white list indicates the items that your system will automatically allow into your inbox directly.

If a contact has been marked to not allow email messages, or if a contact is not currently in the system for that email address, then the Smart SPAM filter will then move the item to the SPAM folder automatically and send an authentication email back to the sender of the incoming email.

When the sending user receives the automated email authentication message, the original sender will be prompted to reply to the authentication message to confirm that it is in fact the original sender and not a SPAM engine. When the Smart SPAM filter receives the authentication email response, it then can confirm a complete path from your email inbox back to the original sender and back to your inbox. With all of this information authenticated, the Smart SPAM filter will move the email into your email inbox. This prevents the possibility of important emails getting caught up in your SPAM filters.

Smart SPAM Filters currently reduce your SPAM by greater than 95%, and remove the possibility of losing real emails.

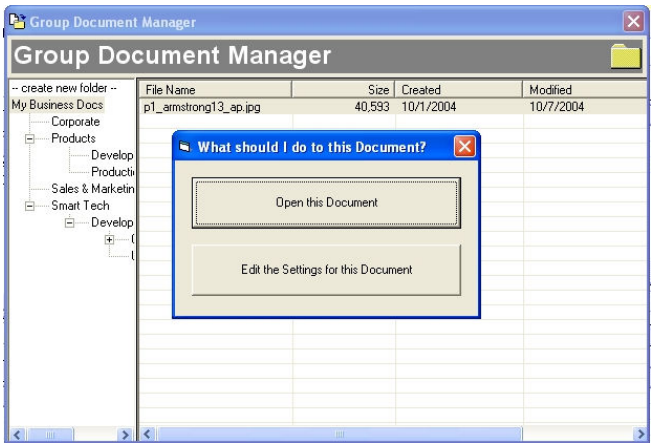
Chapter #6 - Document Manager

The Document Management controls of the smart.Biz.Kit system are accessible through both your Microsoft Windows operating system, but also through the smart.Biz.Kit itself. These controls allow you to stored documents into your (MyBizDocs) folder that is located on the Desktop of your computer.

The Documents that are saved into this directory are automatically transmitted to all other users in the group into their MyBizDocs folder. This creates a combined central document repository for all of your users.

The following is a description of each of the areas in the Document Management system:

Group Document Manager



The Group Document Manager toolset is designed to allow you to manage and access your BizDocs from within the smart.Biz.Kit system. From this control, you can click on the title of a document and drag it onto different windows and tools within the smart.Biz.Kit system. In certain areas of the system this will create a link to the contact, appointment, task, ticket, project, or email.

If you wish to open or edit a documents, you simply double click on the title of the document from the list. This will activate the options window and allow you to either (Open the Document) or (Edit the Settings for this Document). If you choose to open, the smart.Biz.Kit will use the assigned default program from windows to open the application or it will prompt you for the application to use to open the document. If you choose Edit, you will be able to set specific options and information about the document.

Document Folders Manager

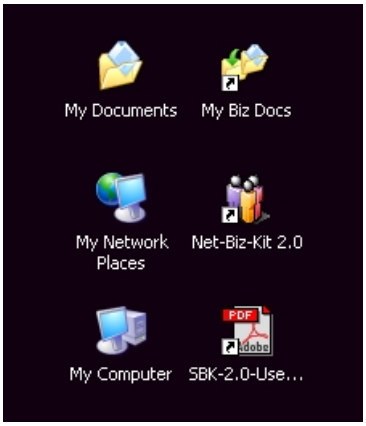
The Documents Folders Manager provides a listing of all of the document folders that are available. You can click on the link for Create New Folder to add an additional folder or click the title of a folder to view its contents on the right side of the screen.

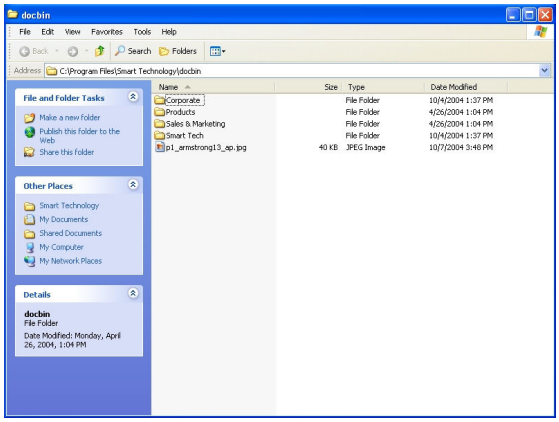
Document Listing Manager

The Document Listing Manager displays a listing of all documents that are in the folder that is selected on the left side Document Folder Manager. Each document that is listed also displays the file size, the date created, and the date last modified. To access or edit the settings for any item, simply double click on the title.

MyBizDocs Windows Desktop Folder

The MyBizDocs windows desktop folder is direct access to the documents from your group document management system. You can also reach this folder using windows explorer, or the save as, and open file options from all windows applications. By clicking on the MyBizDocs folder on your desktop and displayed as the upper right icon in the image on the right, you will activate the Microsoft windows explorer with full access to all of the documents in your system.

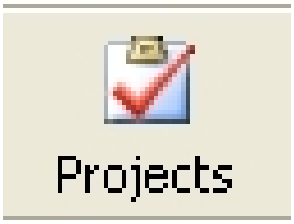




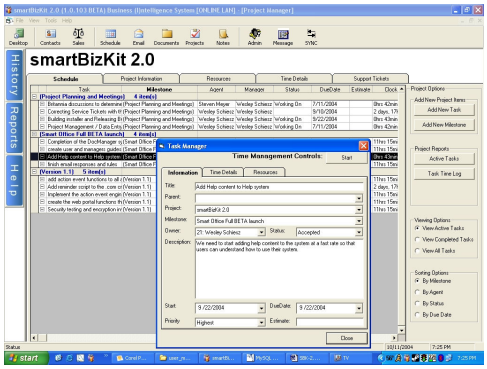
Important Info about MyBizDocs

When using a synchronized document management solution such as this one, you will notice that documents simply appear and disappear from the group at all times. This is normal with this type of solution.

Chapter #7 - Project Manager



A unique feature that is included with the smart.Biz.Kit is the Project Management system. One of the centric items is the functionality that an integrated Project Management system provides. You can organize your operations, enhance internal communication, and implement structured workflow for projects of all sizes.

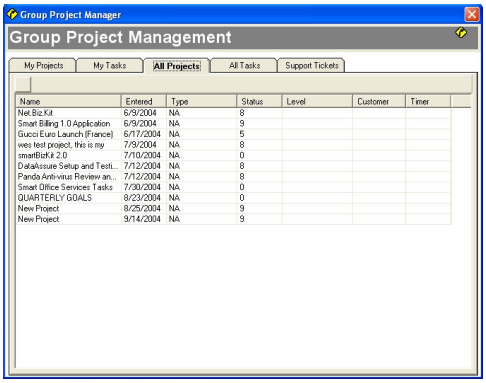


The Project Manager is designed to provide general scheduling, resource planning, time forecasting, time tracking, support tracking, and collaboration automation. The following pages through this chapter detail each of the functions of the project management system.

Group Project Management Locator

After clicking on the (Projects) button from the top main toolbar of the smart.Biz.Kit, you will be presented with the Project Management Locator. This will provide you with 5 tabs to choose from. The tabs are as follows:

My Projects Tab



The My Projects Tab provides a listing of all the appointments that are assigned to you. You can sort your project list by clicking on any of the column titles. You can also add a new project by clicking the (New) button from the toolbar above the project listings.

My Tasks Tab

The My Tasks Tab will provide a listing of all the tasks that are stored and active in the system that are currently assigned to you. You can access any of the tasks by double clicking on the title of the task.

All Projects Tab

The All Projects Tab will display a listing of all of the projects that are currently listed as active in the system for your group. You can access any of the projects by double clicking on the title of the project.

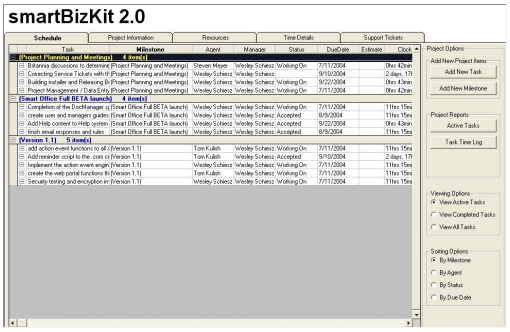
All Tasks Tab

The All Tasks Tab will display a listing of all of the tasks that are currently listed as active in the system for your group. You can access any of the tasks by double clicking on the title of the task.

Support Tickets Tab

The Support Tickets Tab will display a listing of all of the support tickets that are stored in the system for your group. You can access any of the tickets by double clicking on the title of the ticket in the list.

Project Management Editor



The Project Management Editor provides the essential controls for editing and managing the project and all of its elements. The Editor was designed to provide you with a complete set of tools to schedule, review, and communicate about a project.

Project Schedule Tab

The Project Schedule tab provides the most comprehensive listing of settings and options for the entire project. The schedule tab provides the list view of the project plan. On the right side of the screen, you can adjust the grouping and ordering to see the tasks that you need to see. There are also buttons for adding a new task, adding a new milestone, and for the task report and task time report. Click any of these buttons to activate the respective functions.

Project Information Tab

The Project Information tab displays and allows you to edit the general information pertaining to the project itself. You can change the status of the entire project from this screen as well by simply adjusting the status.

Project Resources Tab

The resources tab will list any of the agent resources that are assigned to any task or ticket from this project. If a project manager has assigned resources and time amounts, this screen can be used to total the resources needed for the project.

Project Time Details Tab

The Project Time Details tab provides a consolidated listing of the times that have been recorded under this project. This display will include all tasks and ticket items.

Project Support Tickets Tab

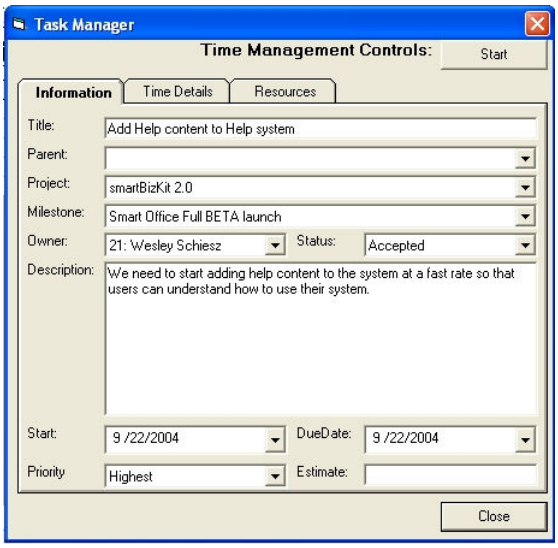
The Project Support Tickets tab will display all of the support ticket that are currently active in the system and are attached to this project.

Milestone Editor Tool

The Milestone Editor Tool allows you to add and edit Milestones that are assigned to projects. To active the tool, simply double click on any milestone from the Project Schedule. You can also activate the editor when you add a new Milestone to a Project.

Task Editor Tool

The Task Editor tool brings together all of the tools that managed under a single task. The editor provides 3 tabs for General Task information, Time History Details, and Current Task Resources listing. The Task Editor also includes the (Start/Stop) Time Management Controls.



The Following is a description of each section and function for the Task Editor Tool:

Task Information Tab

The Task Information tab allows you to edit the primary information pertaining to the task. The information is as follows:

Title – This stores the title for the task.

Parent – The parent option indicates if this task comes after another task. If so, then this task will not appear or be allowed to clock time until the parent task has been completed.

Project – This stores the name of the project that this task belongs to.

Milestone – The Milestone stored the name of the milestone that this task belongs to.

Owner – The Owner indicates who this task is assigned to. This agent is responsible for all aspects of the task and it will appear on their desktop project management controls.

Status – The status indicates the current level that the task record is at. This is a predefined workflow for the tasks.

Description – The description is a detailed accounting of what the task is about. Use this area to store any information that cannot be stored in other fields on this tool.

Start – This defaults to the entered date, but can be changed to a date that this task is planned to begin on.

Due Date – The due date is the date on which this task must be completed. The task reporting functions of the project management system will report tasks as overdue that have passed this date.

Priority – The priority indicates the importance of this task. You can sort your task lists by priority and use this control to organize your items accordingly.

Estimate – The estimate field is an override or bypass control for the resource manager. If you do not use resource planning, or wish to override the planning tools estimates, enter in a total amount of time in minutes into this field and the system will use it instead of the totals from the other tools.

Task Time Detail Tab

The task time detail tab provides a listing of the recorded task times for the current task. Each time will include a description of the activities that took place. You can double click on the task time to edit the specific time frames that are stored.

Task Resources Tab

The Task Resources tab will provide a detailed listing of the resources that are assigned to this task. This can be used to track time requirements and resource forecasting during project planning.

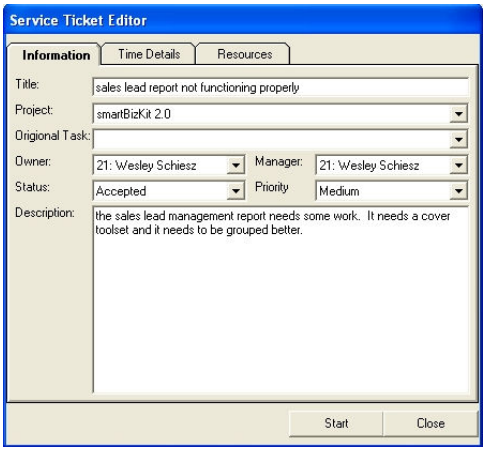
Task Time Management Tool

The Task Time Management Tool is essentially a stopwatch. It is designed to allow any member of the group to click the start button to activate the timer. When activated, there will be a small clock window that will appear at the top of you screen. The window will display a stop button and will also detail the time spent on the task.

When a user clicks on the stop button, they are required to enter a note that describes what they did on the task during the time. This allows the Task Time Detail tab to provide in depth information about the time spent on the task.

Service Ticket Tool

The Service Ticket Tool provides users with a comprehensive set of tools for storing your issue reports. By storing service tickets, the system can help you reduce response times, ensure reliability and improve communication with the clients.



Ticket Information Tab

The Ticket Information tab allows you to edit the primary information pertaining to the ticket. The information is as follows:

Title – This stores the title for the ticket.

Project – This stores the name of the project that this ticket belongs to.

Original Task – The stores the name of the original task that caused this error.

Owner – The Owner indicates who this ticket is assigned to. This agent is responsible for all aspects of the ticket and it will appear on their desktop project management controls.

Manager – The Manager indicates who this ticket is reported to. This agent is will receive update notifications about the status of this ticket.

Status – The status indicates the current level that the ticket record is at. This is a predefined workflow for the tickets.

Priority – The priority indicates the importance of this ticket. You can sort your ticket lists by priority and use this control to organize your items accordingly.

Description – The description is a detailed accounting of what the ticket is about. Use this area to store any information that cannot be stored in other fields on this tool.

Ticket Time Detail Tab

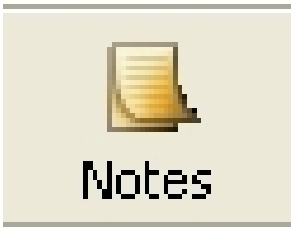
The ticket time detail tab provides a listing of the recorded ticket times for the current ticket. Each time will include a description of the activities that took place. You can double click on the ticket time to edit the specific time frames that are stored.

Ticket Resources Tab

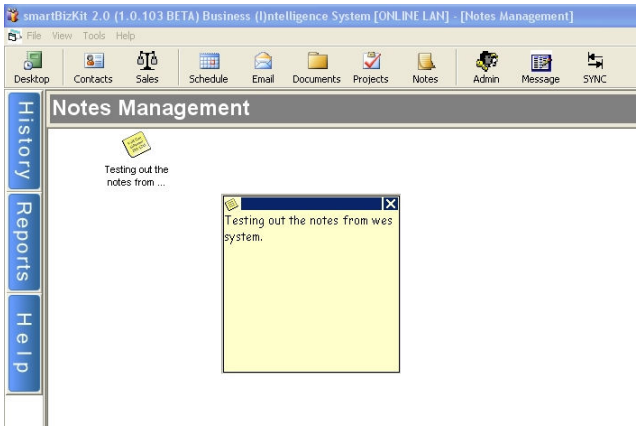
The Ticket Resources tab will provide a detailed listing of the resources that are assigned to this ticket. This can be used to track time requirements and resource forecasting during project planning.

Chapter #8 - Notes Manager

The Notes Manager was designed to add a simple sticky note function to the smart.Biz.Kit system. It is designed to provide only basic Note Management functions for users.



The following is a description of the primary features of the Notes Management system:



Notes Management Window

The Notes Management Window provides the overview list of the sticky notes that you currently have stored in the system.

The following are available features of the Notes Management system:

Adding a Note to the system

To add a new note to the system, simply double click on the white background area that is inside of the notes management window. After doing this, a new sticky note will appear and will allow you to record your note in the area provided.

Saving a Note to the system

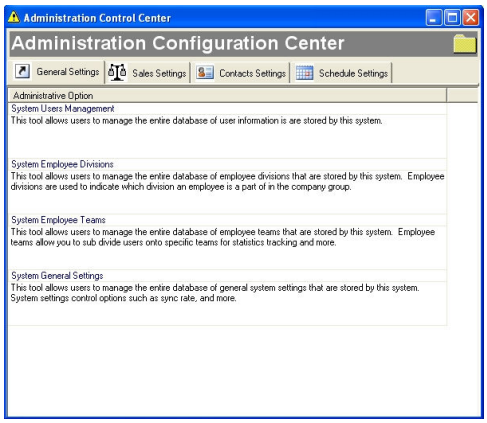
Saving a note to the system is unbelievably simple. All you need to do is close the note and the system will save all of your data. It's that easy!

Deleting a Note from the system

Deleting a Note from the system is even easier. When you are viewing the notes board, simply click once on an appointment and then press the delete button on your keyboard. This will remove the note from the system automatically.

Chapter #9 - Administration Tools

One of the most important areas of the smart.Biz.Kit is the Administration Configuration Center. This toolset allows administrators, assistants, and general users to configure their systems to work and display information the way that they want it.


Administration Control Center
Administration Configuration Center
General Settings
Sales Settings
Contacts Settings
Schedule Settings
Administrative Option
System Users Management
This tool allows users to manage the entire database of user information is are stored by this system.
System Employee Divisions
This tool allows users to manage the entire database of employee divisions that are stored by this system. Employee divisions are used to indicate which division an employee is a part of in the company group.
System Employee Teams
This tool allows users to manage the entire database of employee teams that are stored by this system. Employee teams allow you to sub divide users onto specific teams for statistics tracking and more.
System General Settings
This tool allows users to manage the entire database of general system settings that are stored by this system. System settings control options such as sync rate, and more.

The entire administrative area is designed with a leveled provisioning system. There may be some items in this chapter that do not appear on your screen as they are described. In most instances, this is because you to not have the ability or permission to use the tool that we are discussing.

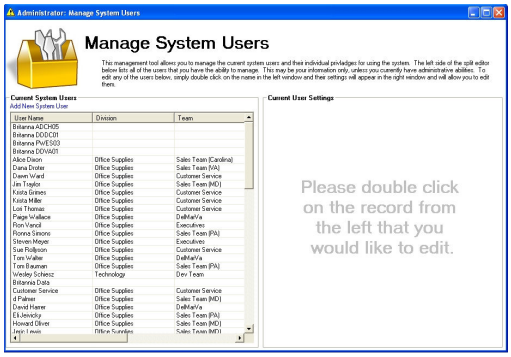
The Administrative tools are broken up into 4 different sections and are displayed on different tabs in the administrative center. The descriptions for each are as follows:

General Settings Tab

The General Settings list all of the administrative tools that configure the general system operation and functionality. The description of each of the administrative tools follows:

System Users Management

The System Users Management controls provide a direct management control set for adding, editing, and removing group users and user access. Depending on your current system permissions, you will see a listing of the records that you have access to within your group.

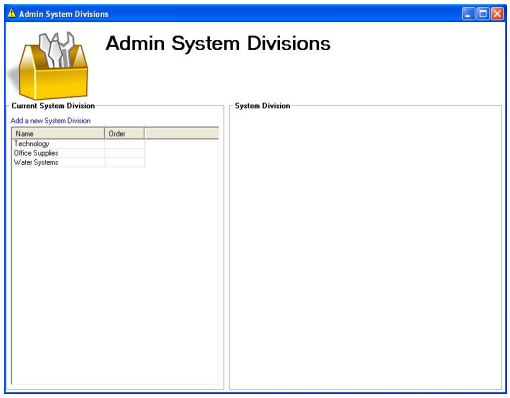

Administrator: Manage System Users
Manage System Users
Current System Users
Add New System User
Current User Settings
Please double click on the record from the left that you would like to edit.

If you have administrative privileges then you will be able to click on the (Add New System User) link and create a new system user.

To edit the settings for any user that is in your users list, simply double click on the users name to activate the editing controls on the right side of the screen. You can control all of the features and settings for any user in the system from this one control area. Administrators should use this tool to ensure that other users system setting are correct.

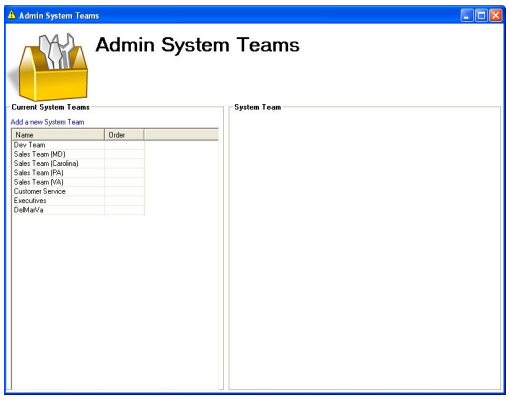
NOTE: It is important that you always enter an email address for system users. There are many parts of the system that will not work if you do not have your proper email address information correctly entered into the system user manager.

System Employee Divisions



System Employee Divisions are designed to allow companies leverage the cross division tools for employees. One of the key features of the smart.Biz.Kit is its ability to force sales managers from one division to prospect business for another division. If you have multiple divisions or product lines, you should use the divisions feature to keep these items separated on your sales reports. If you do not feel this is necessary, you should create at least one and place all users in the same division.

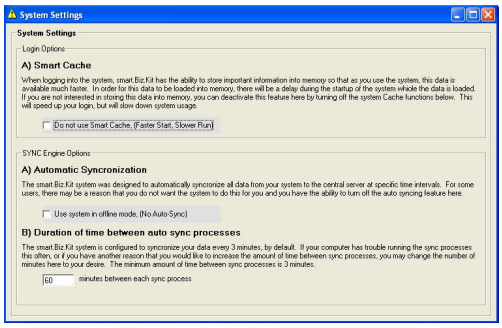
System Employee Teams



The System Employee Teams administrative control allows you to manage specific teams that employees are grouped together into. This is frequently used for sales incentives, or to separate departments within companies.

To add a new team, simply click the (Add New System Team). To edit any of the items in the list, double click on the name of the team to display the edit controls on the right side of the screen.

System General Settings


System Settings
System Settings
Login Options
A) Smart Cache
Do not use Smart Cache. (Faster Start, Slower Run)
SYNC Engine Options
A) Automatic Syncronization
Use system in offline mode. (No Auto-Sync)
B) Duration of time between auto sync processes
60
minutes between each sync process

The system general settings administrative tool allows you to edit settings for the general operation of the system. Currently it provides control options for the system login and the Sync Engine process.

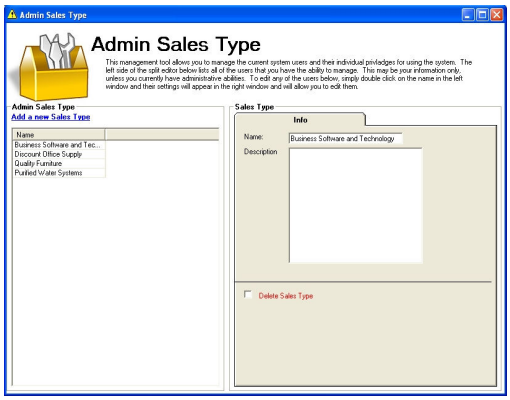
Login Options:
The option to turn off your system cache functions during login. This will help the system load faster if you have a large number of contacts. It will slow your systems operation down considerably if you do not run with this option turned on and you have a lot of contacts in your system.

SYNC Engine Options:
The SYNC engine options that are provided are detailed in chapter #13 below. Please read the complete documentation in this section.

Sales Settings Tab

The Sales Settings tab displays items that are specific to the sales management engine. The following administrative tools are available.

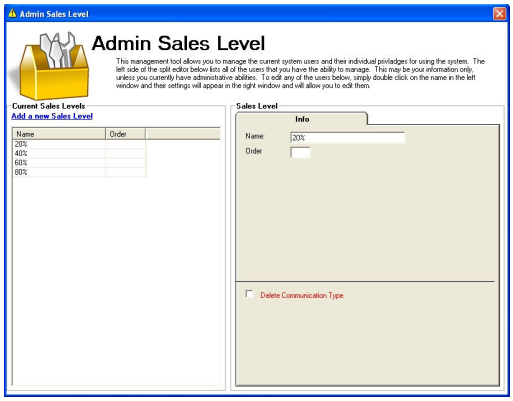
Sales Type Management



The Sales Type management tool allows you to add, edit, and delete sales types. Sales Types are normally used to separate sales of products between product lines, or company divisions.

To add a new sales type, click the (Add a new Sales Type) link and the system will create a new template record. To edit any of the sales types double click on the name of the type and the edit controls will load on the right side of the screen. To delete the sales type, place a check in the box that is to the left of the red (Delete Sales Type) text.

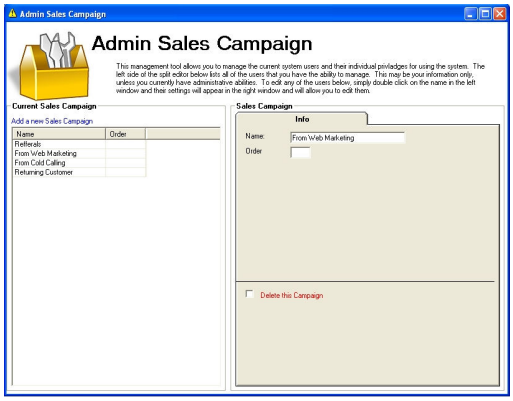
Sales Level Management



The Sales Level management tool allows you to add, edit, and delete sales levels. Sales Levels are normally used to indicate the current status of a sales effort. Many companies will use a "percent to close" approach and create Sales Levels of 20%, 40%, 60%, 80%, and 100% or closed.

To add a new sales level, click the (Add a new Sales Level) link and the system will create a new template record. To edit any of the sales levels double click on the name of the level and the edit controls will load on the right side of the screen. To delete the sales level, place a check in the box that is to the left of the red (Delete Sales Level) text.

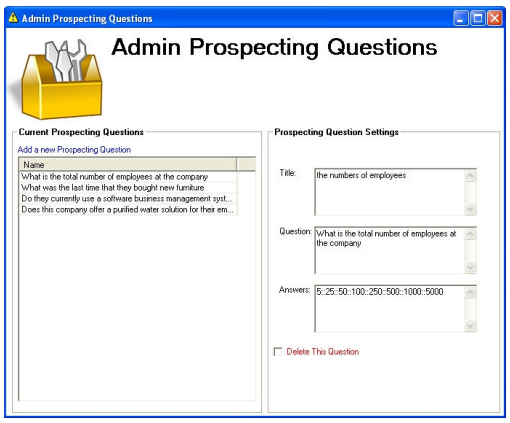
Sales Campaign Management



The Sales Campaign management tool allows you to add, edit, and delete sales campaigns. Sales Campaigns are normally used to track marketing and specific plans and techniques.

To add a new sales campaign, click the (Add a new Sales Campaign) link and the system will create a new template record. To edit any of the sales campaign double click on the name of the campaign and the edit controls will load on the right side of the screen. To delete the sales campaign, place a check in the box that is to the left of the red (Delete Sales Campaign) text.

Prospecting Management


Admin Prospecting Questions
Admin Prospecting Questions
Current Prospecting Questions
Add a new Prospecting Question
Name
What is the total number of employees at the company
What was the last time that they bought new furniture
Do they currently use a software business management syst...
Does this company offer a purified water solution for their em...
Prospecting Question Settings
Title:
the numbers of employees
Question:
What is the total number of employees at the company
Answers:
5::25::50::100::250::500::1000::5000
Delete This Question

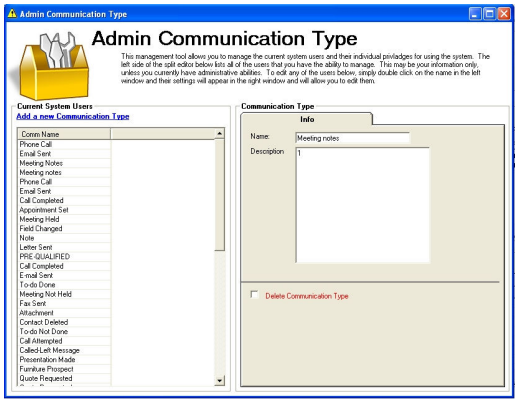
The Prospecting Management administrative toolset is designed to allow you to add, edit, and remove prospecting questions from the system. This interface allows for easy management, in one location.

To add a new prospecting question, click the (Add a new Prospecting Question) link and the system will create a new template record. To edit any of the prospecting questions double click on the name of the question and the edit controls will load on the right side of the screen. To delete the prospecting question, place a check in the box that is to the left of the red (Delete This Question) text.

Contacts Settings Tab

The Contacts Settings tab displays the administrative tools that pertain to the Contact Management tools of the system. The following tools are available.

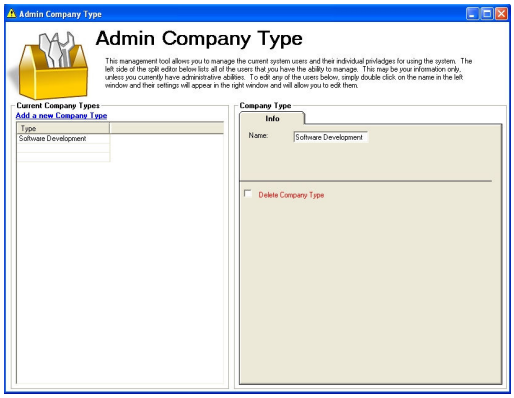
Communication Type Management



Communication types drive the advanced notes management system. These types are used to organize and monitor activity between company employees and company clients.

To add a new communication type, click the (Add a new Communication Type) link and the system will create a new template record. To edit any of the communication types double click on the name of the type and the edit controls will load on the right side of the screen. To delete the communication type, place a check in the box that is to the left of the red (Delete Communication Type) text.

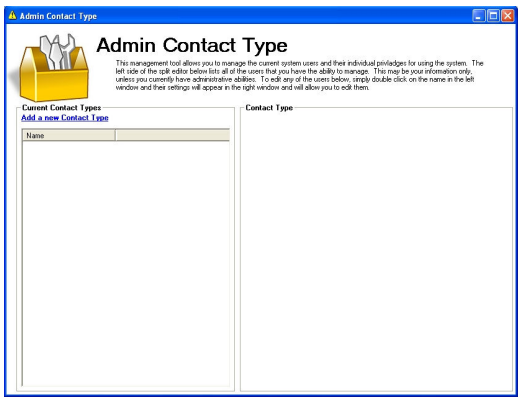
Company Type Management



Company types drive the company management system. These types are used to organize and monitor company information into types. This is normally a market or industry the company belongs to.

To add a new company type, click the (Add a new Company Type) link and the system will create a new template record. To edit any of the company types double click on the name of the type and the edit controls will load on the right side of the screen. To delete the company type, place a check in the box that is to the left of the red (Delete Company Type) text.

Contact Type Management



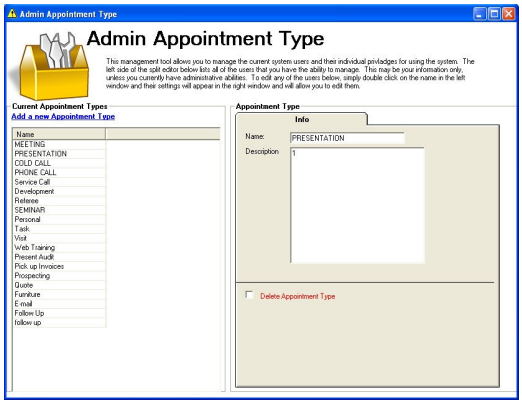
Contact types drive the contact management system. These types are used to organize and monitor contact information into types. This is normally the position the contact holds at the company.

To add a new contact type, click the (Add a new Contact Type) link and the system will create a new template record. To edit any of the contact types double click on the name of the type and the edit controls will load on the right side of the screen. To delete the contact type, place a check in the box that is to the left of the red (Delete Contact Type) text.

Schedule Settings Tab

The Schedule Settings tab displays the administrative tools that pertain to the Schedule Management tools of the system. The following tools are available.

Appointment Type Management


Admin Appointment Type
Admin Appointment Type
This management tool allows you to manage the current system users and their individual privledges for using the system. The left side of the split editor below lists all of the users that you have the ability to manage. This may be your information only, unless you currently have administrative abilities. To edit any of the users below, simply double click on the name in the left window and their settings will appear in the right window and will allow you to edit them.
Current Appointment Types
Add a new Appointment Type
Name
MEETING
PRESENTATION
COLD CALL
PHONE CALL
Service Call
Development
Referee
SEMINAR
Personal
Task
Visit
Web Training
Present Audit
Pick up Invoices
Prospecting
Quote
Furniture
E-mail
Follow Up
follow up
Appointment Type
Info
Name:
PRESENTATION
Description:
1
Delete Appointment Type

Appointment types drive the schedule management system. These types are used to organize and monitor schedule appointment information into types.

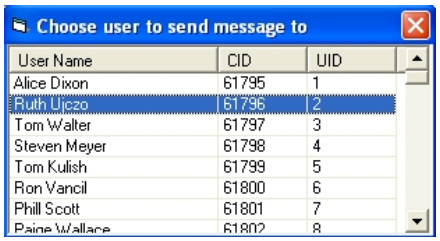
To add a new appointment type, click the (Add a new Appointment Type) link and the system will create a new template record. To edit any of the appointment types double click on the name of the type and the edit controls will load on the right side of the screen. To delete the appointment type, place a check in the box that is to the left of the red (Delete Appointment Type) text.

Chapter #10 - Instant Messaging Tools

The smart.Biz.Kit system was designed to allow for remote business communications. Today's Instant Messaging technologies have caught on in a major way with almost every computer user. For business this can become a problem for some employees as they starting typing messages to anyone, anytime.

Our instant messenger software is different from all of the other systems on the market in that, companies and managers can monitor usage for this system. In the future, your company may only allow for secured Instant Messaging capabilities. smart.Biz.Kit is providing them today!

The following is a description of how to use the smart.Biz.Kit messenger:



Active User Selection

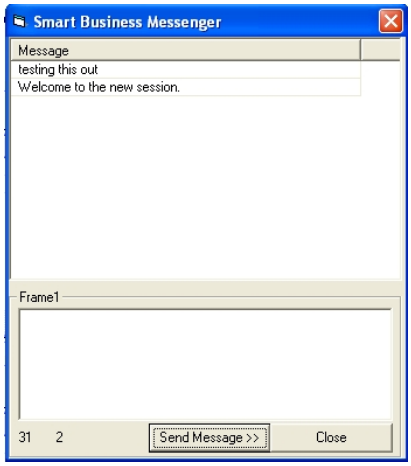
The Active User Selection window is activated when you click on the (Message) button on the top main menu of the smart.Biz.Kit. When this screen appears, it displays all of the currently active users that are on the system. You can begin a conversation with them by double clicking on their name.

Instant Message Window

When you start a chat session with another user, or if they start one with you, the next screen that will appear will be the Instant Message window. The Instant Message window is designed to provide you with a full transcript of the current message and a text area to send replies.

Sending a message

To send a message, simply enter a message into the send message box and then click the (Send Message) button to transmit the information to the other user in the conversation.

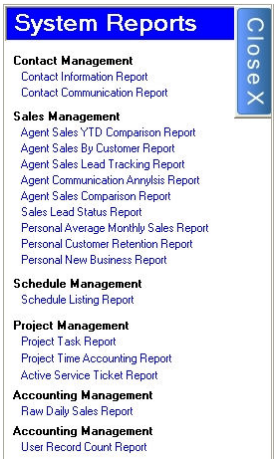


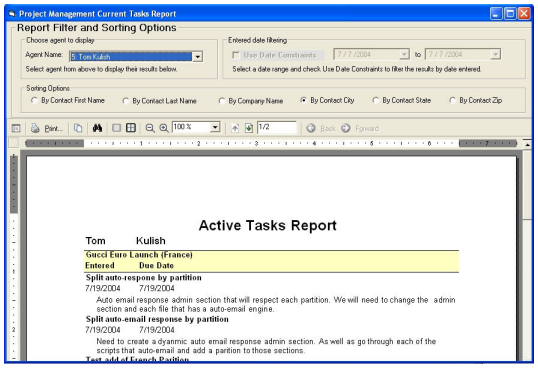
Closing a conversation

To close a conversation and also disconnect the other user, simply click on the (Close) button at any time while the window is opened. This will also clear any transcripts from the database at once.

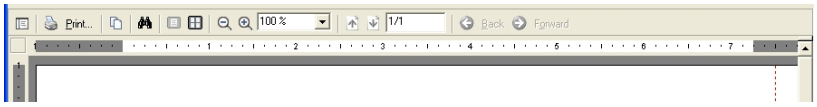
Chapter #11 – Intelligent Reporting Features

The smart.Biz.Kit includes one of the most powerful reporting engines available on the market today. You have the ability to generate reports on real-time data, you have numerous sorting and filtering options, you can export the report to .pdf files or .xls files, and you can print high quality reports on almost any printer.





General Reporting Toolbar

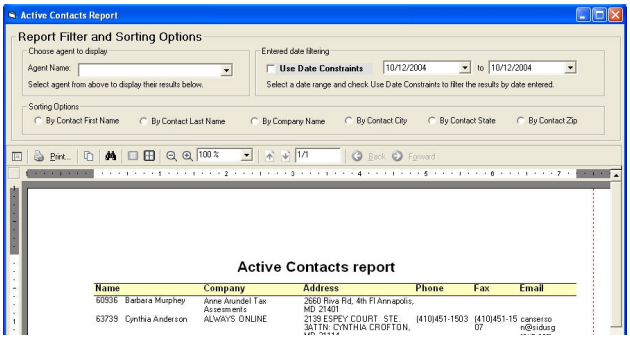


The General Reporting Toolbar is the toolbar that is at the top of any report that you run in the smart.Biz.Kit system. This toolbar offers several different ways to arrange the report display on your screen. You can also sort and move through the pages on a report by using the up and down arrows. You can print the report, zoom in on the data of the report, switch from a single page display to a double or a quad display screen, and you can find specific text from the report displayed by using the controls on this menu.

Contact Management

The Contact Management reports are all reporting on data from the Contact Management System. These reports are all available from the Main Sidebar Toolset.

Contact Information Report

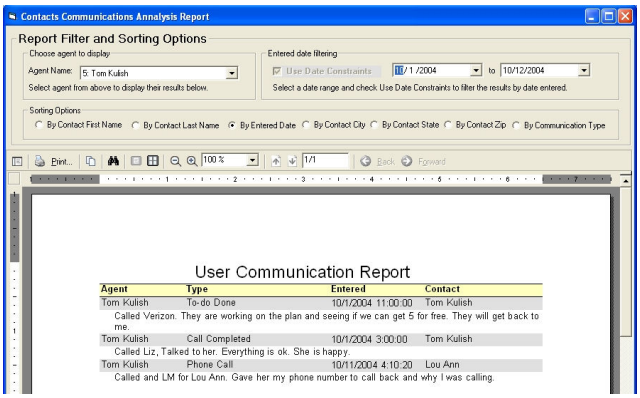


The Contact Information Report is designed to provide users with general contact information for the contact records that are stored in the system for you.

The report allows you to select different system users to view their contact records. To see contact records that were entered into the system during a specific period of time, simply check the box that indicates that you want to use the date constraints, and then choose your date range and the report will refresh.

You have six different sorting options to choose from by simply checking the sort order that you want to use.

Contact Communication Report



The Contact Communication Report provides you with a complete listing of the contact communications during a specific date range that you can select at the top of the report.

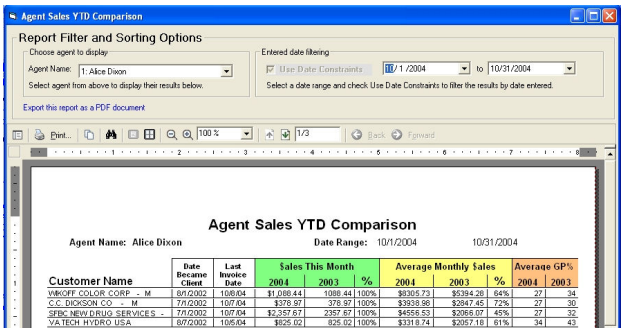
The report will display the agent's name that recorded the communication, the communication type, the entered date, and the contact that the communication was with. The agent note that was recorded when an agent records a communication.

The report can be sorted by seven different patterns that are listed under the Sort Options area.

Sales Management

The Sales Management reports are all reporting on data from the Sales Management System. These reports are all available from the Main Sidebar Toolset.

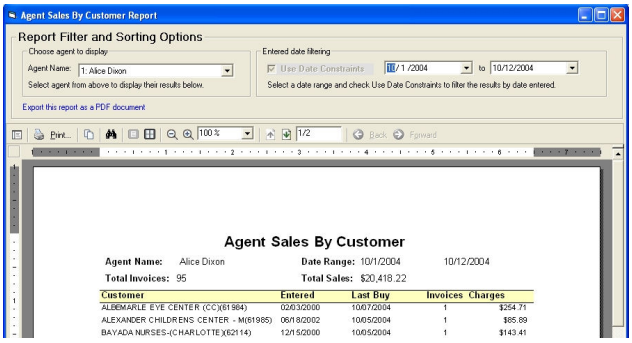
Agent Sales YTD Report


Agent Sales YTD Comparison
Report Filter and Sorting Options
Agent Sales YTD Comparison
Agent Name: Alice Dixon
Date Range: 10/1/2004 10/31/2004

Agent Sales YTD Report provides an insight to a sales managers sales this year verses last year. The report provides a green zone that reports sales this year / this month vs. sales last year / this month. There is also a yellow zone that reports average monthly sales this year verses average monthly sales last year. Orange compares the GP of this year from last year.

The report provides two dates, the date that the contact was entered, and the date that the last purchase was made on the account. This report includes a (Save ad a PDF Document) link. Clicking this report will generate a .pdf file from the results of this report.

Agent Sales By Customer Report

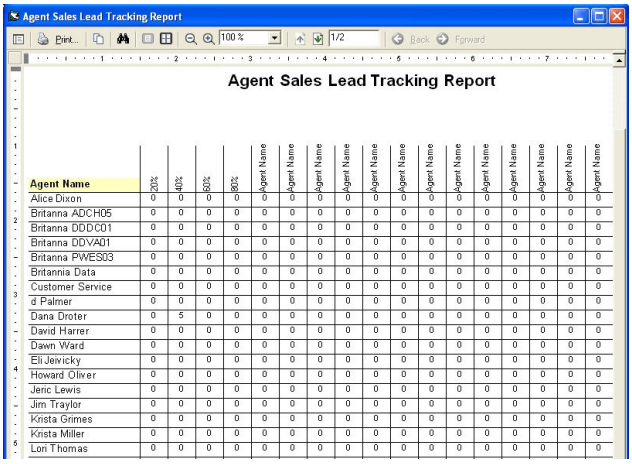

Agent Sales By Customer Report
Report Filter and Sorting Options
Agent Sales By Customer
Agent Name: Alice Dixon
Date Range: 10/1/2004 10/12/2004
Total Invoices: 95
Total Sales: $20,418.22

The Agent Sales by Customer Report was designed to provide you with a break down of all charges for the specified period at the top of the screen. The charges will be totaled and grouped by company name.

The report includes a total count of invoices and a total count of sales at the top of the report.

This report includes a (Save ad a PDF Document) link. Clicking this report will generate a .pdf file from the results of this report.

Agent Sales Lead Tracking Report

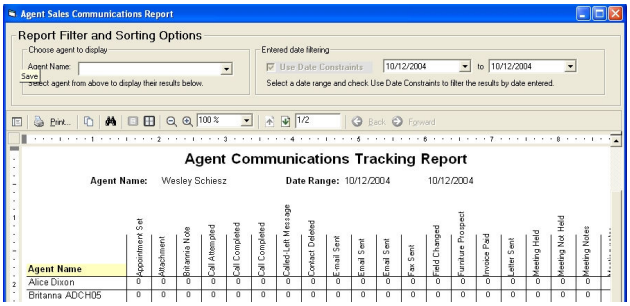


The Agent Sales Lead Tracking report is designed to provide an overview of the current Sales Leads and what levels they are currently stored at. For any Sales Level that is configured in the system, the report will list it out on the top of the report.

The report body lists each user from the system and displays a count for the # of records that are currently stored for that specific user. The report is limited to a maximum of 25 sales levels.

This report is best printed in landscape mode.

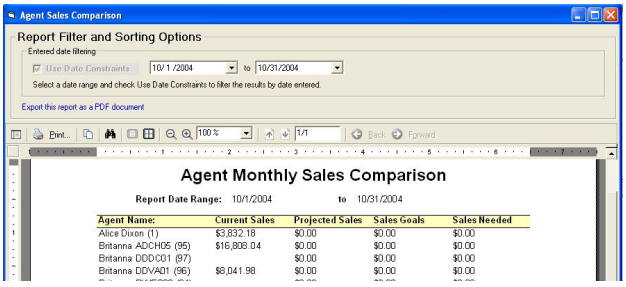
Agent Communication Analysis Report



The Agent Communication Analysis report provides an overview of the entire company and its communication history during the date range that is listed on the top of the report screen.

The report can display up to 25 total communication types across the top of the report and will list the counting for each user and each type that are currently available in the system.

Agent Sales Comparison Report

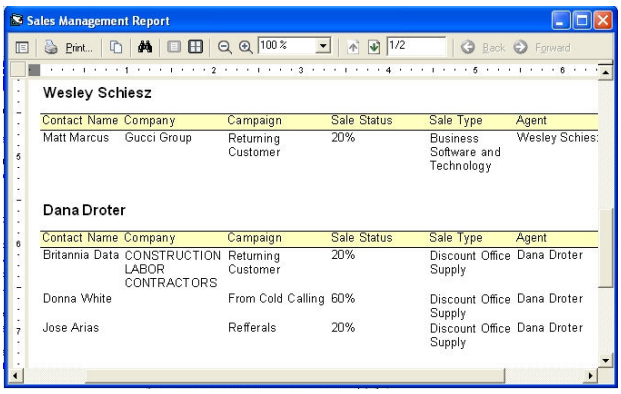

Agent Sales Comparison
Report Filter and Sorting Options
Agent Monthly Sales Comparison
Report Date Range: 10/1/2004 to 10/31/2004
Agent Name: Current Sales Projected Sales Sales Goals Sales Needed
Alice Dixon (1) $3,832.18 $0.00 $0.00 $0.00
Britanna ADCH05 (95) $16,809.04 $0.00 $0.00 $0.00
Britanna DDDC01 (97) $0.00 $0.00 $0.00
Britanna DDVA01 (96) $8,041.98 $0.00 $0.00 $0.00

The Agent Sales Comparison report provides a simple comparison of the total sales for each user of the system during a specific period of time.

This report can be saved as a PDF document as well as printed on almost any printer.

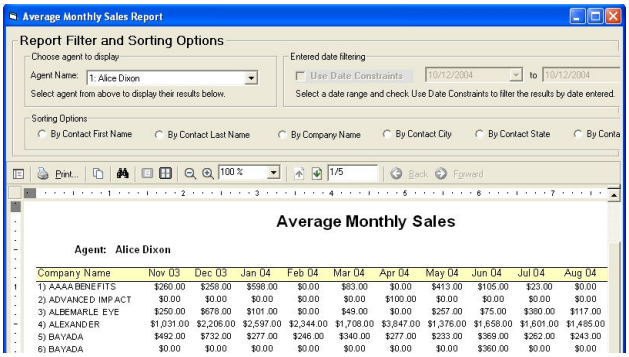
Sales Lead Status Report

The Sales Lead Status report provides users with a listing of the current leads that they have stored in the system. This report provides the most highly important lead information so that sales employees can keep track of multiple opportunities that are running at the same time.


Sales Management Report
Wesley Schiesz
Contact Name Company Campaign Sale Status Sale Type Agent
Matt Marcus Gucci Group Returning Customer 20% Business Software and Technology Wesley Schies:
Dana Droter
Contact Name Company Campaign Sale Status Sale Type Agent
Britannia Data CONSTRUCTION LABOR CONTRACTORS Returning Customer 20% Discount Office Supply Dana Droter
Donna White From Cold Calling 60% Discount Office Supply Dana Droter
Jose Arias Refferals 20% Discount Office Supply Dana Droter

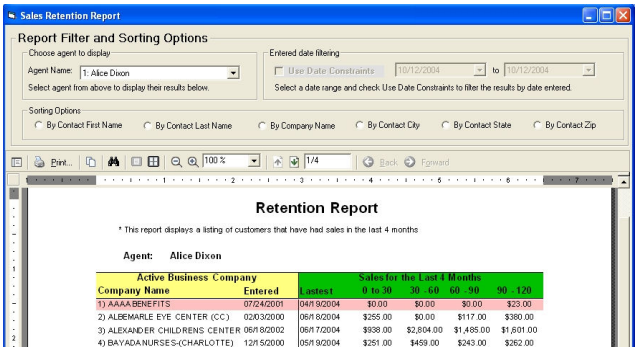
Personal Average Monthly Sales Report

The Personal Average Monthly Sales report provides you with a listing of all of the customers for the sales manager listed in the drop down at the top of the report. Each of the customers in the list will display their monthly sales for each of the last 12 months. This report also provides several sorting options at the top of the list.



Personal Customer Retention Report

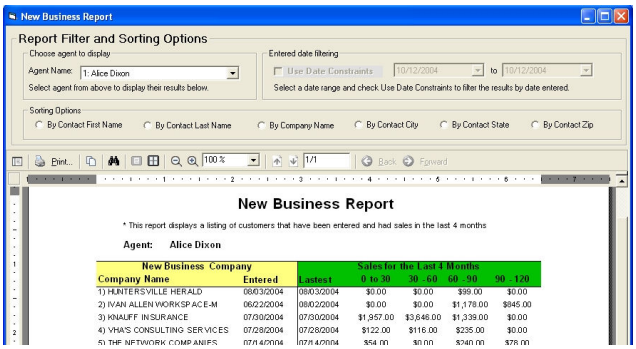
The Personal Customer Retention report is designed to keep track of customers that are active in your system. A customer is defined as active on this report if they have purchased in the last 4 months.


Sales Retention Report
Report Filter and Sorting Options
Retention Report
* This report displays a listing of customers that have had sales in the last 4 months
Agent: Alice Dixon
Active Business Company
Company Name Entered Lastest Sales for the Last 4 Months 0 to 30 30 - 60 60 - 90 90 - 120
1) AAAA BENEFITS 07/24/2001 04/19/2004 $0.00 $0.00 $0.00 $23.00
2) ALBEMARLE EYE CENTER (CC) 02/03/2000 06/18/2004 $255.00 $0.00 $117.00 $380.00
3) ALEXANDER CHILDRENS CENTER 06/18/2002 06/17/2004 $938.00 $2,804.00 $1,485.00 $1,601.00
4) BAYADA NURSES-(CHARLOTTE) 12/15/2000 05/19/2004 $251.00 $459.00 $243.00 $262.00

The report details the total sales for each of the last 4 months. If the customer has not purchased anything for the last 30 days, then the system will report the company name with a red highlight over the row.

Personal New Business Report

The Personal New Business report provides the same functionality as the customer retention report except that it only reports contacts that were entered in the last 4 months.


New Business Report
Report Filter and Sorting Options
Choose agent to display
Agent Name: 1- Alice Dixon
Select agent from above to display their results below.
Entered date filtering
Use Date Constraints
10/12/2004
to
10/12/2004
Select a date range and check Use Date Constraints to filter the results by date entered.
Sorting Options
By Contact First Name
By Contact Last Name
By Company Name
By Contact City
By Contact State
By Contact Zip
Print...
100 %
1/1
Back
Forward
New Business Report
* This report displays a listing of customers that have been entered and had sales in the last 4 months
Agent: Alice Dixon
New Business Company
Company Name
Entered
Sales for the Last 4 Months
Lastest
0 to 30
30 -60
60 -90
90 - 120
1) HUNTERSVILLE HERALD 08/03/2004 08/03/2004 $0.00 $0.00 $99.00 $0.00
2) IVAN ALLEN WORKSPACE-M 06/22/2004 08/02/2004 $0.00 $0.00 $1,178.00 $845.00
3) KNAUFF INSURANCE 07/30/2004 07/30/2004 $1,957.00 $3,646.00 $1,339.00 $0.00
4) YHAS CONSULTING SERVICES 07/28/2004 07/28/2004 $122.00 $116.00 $235.00 $0.00

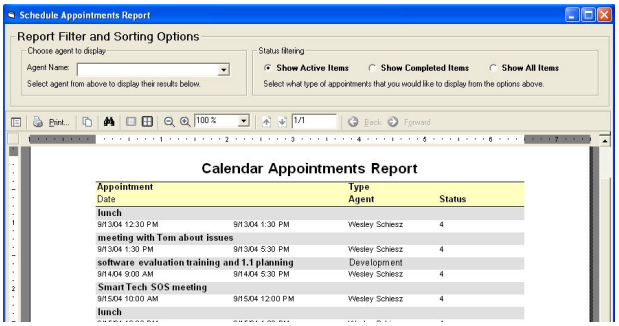
The report is designed to give you a quick view of the new accounts and their purchase activity. This helps to maintain good purchase averages for repeat customers.

Schedule Management

The Schedule Management reports are all reporting on data from the Schedule Management System. These reports are all available from the Main Sidebar Toolset. You can also view extensive printable reports for the schedule management engine by clicking on the (Print Calendar Display) from the main calendar screen.

Schedule Listing Report

The Schedule Listing report provides users with a simple report that lists out all of the appointments that are still active in the system. This listing will display items for the user that is selected at the top of the report. You can also show items of different status by changing the sorting options.



This report can be printed on almost any printer.

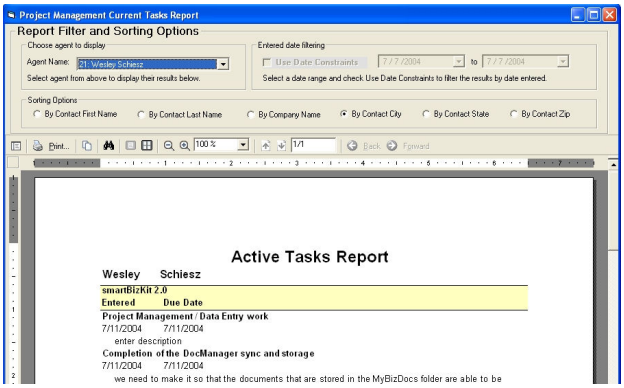
Project Management

The Project Management reports are all reporting on data from the Project Management System. These reports are all available from the Main Sidebar Toolset.

Project Task Report

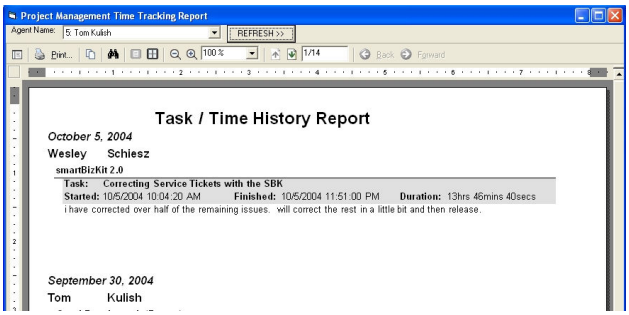
The Project Task report displays the tasks that are active in the system and are assigned to the user that is selected at the top of the report.

This report can be printed with almost any standard printer.


Project Management Current Tasks Report
Report Filter and Sorting Options
Active Tasks Report
Wesley Schiesz
smartBizKit 2.0
Entered Due Date
Project Management / Data Entry work
7/11/2004 7/11/2004
enter description
Completion of the DocManager sync and storage
7/11/2004 7/11/2004
we need to make it so that the documents that are stored in the MyBizDocs folder are able to be

Project Time Accounting Report

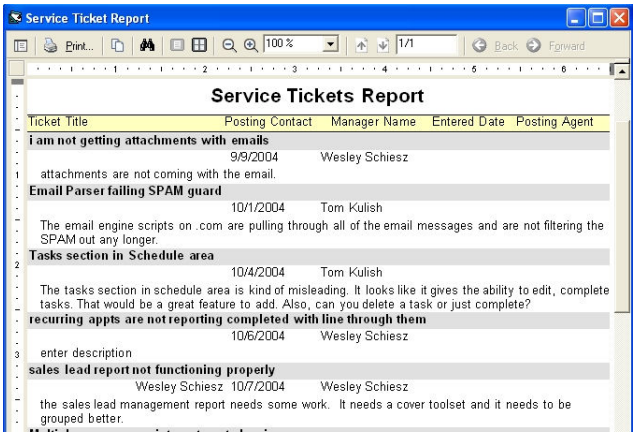
The Project Time Accounting report provides you with a detailed accounting of the time spent on project tasks and tickets. Along with each period of time that is listed, the there is a note area from the agent that recorded the time in the system.


Project Management Time Tracking Report
Task / Time History Report
October 5, 2004
Wesley Schiesz
smartBizKit 2.0
Task: Correcting Service Tickets with the SBK
Started: 10/5/2004 10:04:20 AM Finished: 10/5/2004 11:51:00 PM Duration: 13hrs 46mins 40secs
i have corrected over half of the remaining issues. will correct the rest in a little bit and then release.
September 30, 2004
Tom Kulish

Active Service Ticket Report

The Active Service Ticket Report displays all of the service tickets that are stored in the system and are currently active. Each ticket will display the title, date entered, responsible agent, and the posting agent.

The report is ordered by oldest to newest.

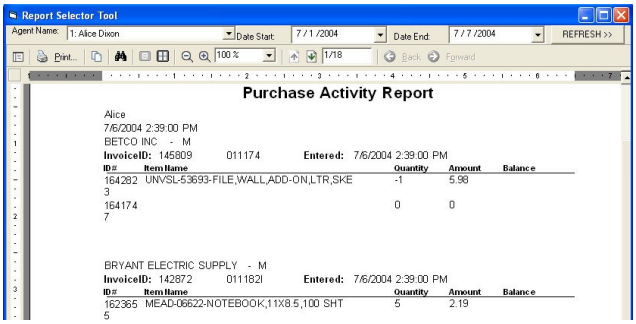

Service Ticket Report
Service Tickets Report
Ticket Title Posting Contact Manager Name Entered Date Posting Agent
i am not getting attachments with emails
9/9/2004 Wesley Schiesz
attachments are not coming with the email.
Email Parser failing SPAM guard
10/1/2004 Tom Kulish
The email engine scripts on .com are pulling through all of the email messages and are not filtering the SPAM out any longer.
Tasks section in Schedule area
10/4/2004 Tom Kulish
The tasks section in schedule area is kind of misleading. It looks like it gives the ability to edit, complete tasks. That would be a great feature to add. Also, can you delete a task or just complete?
recurring appts are not reporting completed with line through them
10/6/2004 Wesley Schiesz
enter description
sales lead report not functioning properly
Wesley Schiesz 10/7/2004 Wesley Schiesz
the sales lead management report needs some work. It needs a cover toolset and it needs to be grouped better.

Accounting Management

The Accounting Management reports are all reporting on data from the Accounting Management System. These reports are all available from the Main Sidebar Toolset.

Raw Daily Sales Report

The Raw Daily Sales report is designed to provide a complete listing of line item sales ordered by invoice number. This report will provide a detailed line item accounting for all invoices that were entered into the system during the time specified on the options at the top of the report.



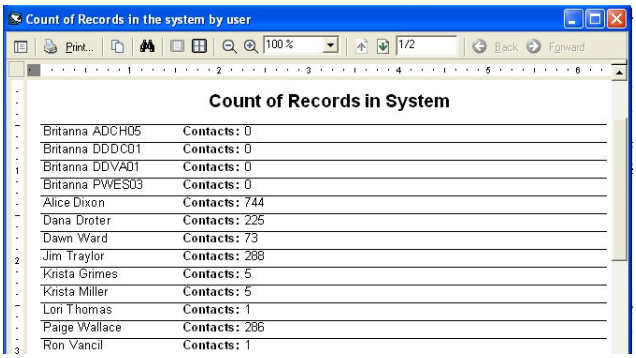
System Reports

The System reports are all reporting on data from the System. These reports are all available from the Main Sidebar Toolset.

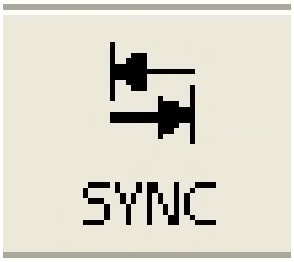
User Record Count Report

The User Record Count report provides a quick report of the number of contact records that are stored in the system. This report will contact total records for other areas of the system in the near future.

This report will print clearly from almost any printer on the market.



Chapter #12 - Group Data Synchronization Tools

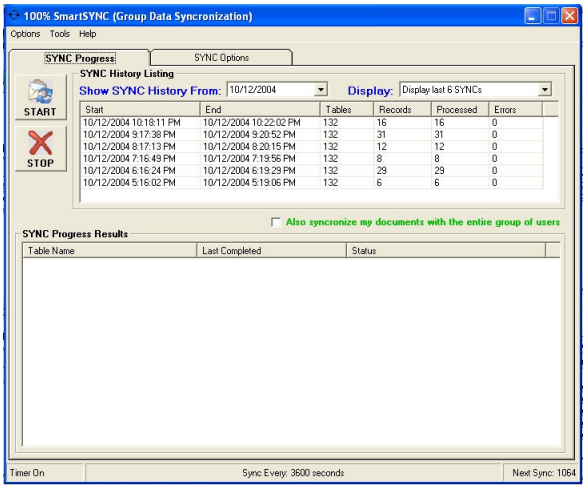


The Group Data Synchronization Tools are designed to connect all other users within your group together. Each person that uses the smart.Biz.Kit connects their data using the synchronization tools. If you change or review records in the system on a regular basis, you should run a sync process often. If not, you should run the sync engine at least once per day to ensure that you get the important data from other users of your group.

Using the Sync Management tools, you are able to place the timer onto auto mode. This mode will automatically run the sync engine after a specific amount of time has passed.

The following is a description of the management tools for the synchronization engine.

Sync Progress Tab


100% SmartSYNC (Group Data Syncronization)
Options Tools Help
SYNC Progress
SYNC Options
SYNC History Listing
Show SYNC History From: 10/12/2004
Display: Display last 6 SYNCs
START
STOP
Start End Tables Records Processed Errors
10/12/2004 10:18:11 PM 10/12/2004 10:22:02 PM 132 16 16 0
10/12/2004 9:17:38 PM 10/12/2004 9:20:52 PM 132 31 31 0
10/12/2004 8:17:13 PM 10/12/2004 8:20:15 PM 132 12 12 0
10/12/2004 7:16:43 PM 10/12/2004 7:19:56 PM 132 8 8 0
10/12/2004 6:16:24 PM 10/12/2004 6:19:29 PM 132 29 29 0
10/12/2004 5:16:02 PM 10/12/2004 5:19:06 PM 132 6 6 0
Also syncronize my documents with the entire group of users
SYNC Progress Results
Table Name Last Completed Status
Timer On
Sync Every: 3600 seconds
Next Sync: 1064

The Sync Progress tab displays important information about the current and recent history of the sync process.

The following is a description of each of the buttons and displays that appear on the screen.

Manual Start / Stop Buttons

The Start and Stop buttons act much like a stop watch for the sync engine. To begin a synchronization run, simply click on the Start button. To stop a run, click on the Stop button.

Sync History Listing

The Sync History listing is the top area of information on the tab. This area will list information pertaining to the history of the sync processes that have taken place on the date that is listed above the history list. You can double click on any of the time frames listed and the results of that sync process will be displayed in the Sync Progress Results list below.

Sync Progress Results

The Sync Progress Results list displays a listing of each of the tables that was synchronized between your application and the central server. If there was a problem while syncing this table, the row will have a red background. If the table is currently downloading information the row will be green, and if it has been completed, it will turn blue. A record counter is also present to represent the number of records processed and synced.

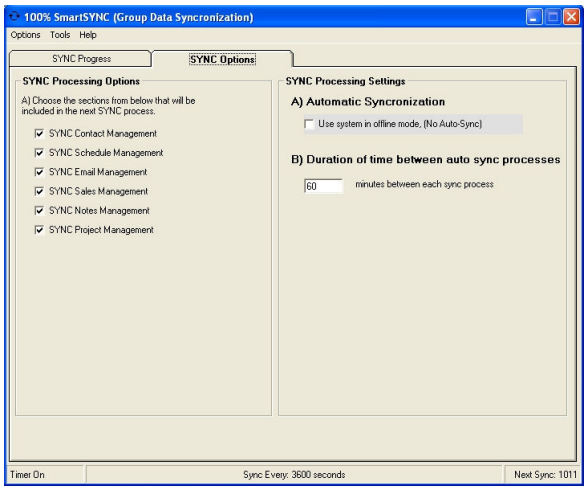
Sync Group Documents Option

The Sync Group Documents option appears as a checkbox on the front screen of the Sync Manager tools. This option indicates if you want to run the document synchronization routines during the next process run. Document synchronization can take a long time to run depending on the number of documents that you have in your group. Documents can be of a various size and an extremely long sync process can happen if your group has too many large documents.

If you are confronted with an extremely long sync process, you can always turn off the document sync until a later time when you will have the time to synchronize your documents.

Sync Options Tab

The Sync Options tab allows the user to modify the settings that are specific to the sync process. They are broken up into the following two groups:


100% SmartSYNC (Group Data Syncronization)
Options Tools Help
SYNC Progress
SYNC Options
SYNC Processing Options
A) Choose the sections from below that will be included in the next SYNC process.
SYNC Contact Management
SYNC Schedule Management
SYNC Email Management
SYNC Sales Management
SYNC Notes Management
SYNC Project Management
SYNC Processing Settings
A) Automatic Syncronization
Use system in offline mode, (No Auto-Sync)
B) Duration of time between auto sync processes
60
minutes between each sync process
Timer On
Sync Every: 3600 seconds
Next Sync: 1011

Sync Processing Options

The Sync Process Options allows you to choose which sections and tools that you want to synchronize your data with the other users in the group. Any section that has a check in the box next to the title will be processed and synchronized with the next processing run.

Sync Processing Settings

The Sync Processing settings provide 2 settings. The first is Automatic Synchronization, which allows you to indicate if you want the automatic sync engine to disengage. If it is checked, the sync engine will not run on its own, if it is not checked then it will sync every time the timer passes the amount of time listed under the duration setting.

The duration setting determines the amount of time between sync processes. It is set to record in a minute's fashion. The duration trigger works as follows:

1. When a user logs into the smart.Biz.Kit the counter starts at the number of minutes that are stored here.
2. If the system stays open for the duration of time listed in the second setting, then the sync engine will be started again.
3. The timer starts again the next time the system restarts.

Chapter #13 - Support for issues

Believe it or not, we don't get asked about support much. Our products are designed to be self explanatory and of the highest quality. Just in case you do need support with anything, we are here for you anytime! We have designed our support services to accommodate everyone from an IT developer to a general system user. We offer basic support services with our service subscriptions and provide the highest quality enterprise support services that are available 4/7/365.

No matter what your needs are from our products, our support engineers are constantly working to make things better for you. We are the world's most effective developers and engineers in the business automation industry.

Basic Level Support

Every user of our SMART.BIZ.KIT software is granted full access to the basic support services of the SMART.BIZ.KIT. Our basic support services are of the highest quality and provide a complete range of support that will empower everyone to use the system to its fullest potential. It is our goal to ensure that our solutions perform to their fullest potential without hesitation.

To ensure that this commitment is executed with the highest degree of accuracy, we provide a basic set of Online Training courses for Managers, Sales Reps, Customer Service Reps, and General System users. Available through our Smart University online education system, these training courses are available 4/7/365 through our world class online education system.

Additional Support Packages Available

Smart Technology has created some of the most advanced training and support packages available today for technology solutions. We have support phone numbers, and 4/7/365 availability to protect your system from any downtime. Although our entire system is designed from the ground up to be the fail-safe, fool-proof, and intuitive, having the added protection of round the clock support is critical for many enterprise and e-Commerce companies.

Our Support packages include the following:

- Basic 48 hours response time Support Services
- Enhanced 24 hour response time Support Services
- Optimized Same Day Support Services (24/7)
- Platinum 12 hour response time (24/7)
- Supreme 2 hours response time (24/7)

Please contact our Sales Department today for specific pricing on Support services for your company.

Chapter #14 - Training for smart.Biz.Kit

Due to the fact that the SMART.BIZ.KIT is such a highly advanced business automation tool, any training that a company invests in, will return on investment in no time due to the increased ramp up speed on the system. Our training programs are designed to be "on-demand" and easy to operate with testing that can be activated by management and providing complete reporting.

Our online training was designed by the same developers that designed the majority of the College Online systems in America. Our training is highly tuned and focused on providing a well rounded source of knowledge from our experts in the industry.

Check it out today and get your Free general training to try our education system out, Free of charge.

General System Training

Every user of the SMART.BIZ.KIT is ensured one free class using our General System training. All optionally and advanced education classes are designed to take users to the next level of experience with using our systems. Our general training is designed to familiarize each user with the specific functions and abilities of the software and to provide users with a clear path to obtaining the knowledge that they need to exceed while using our solutions.

To enjoy this feature rich training that is included with every users system, you must have a fully licensed system. Once your system is licensed, your training accounts will be automatically created and you can begin to immediately enjoy the benefits of full service training.

Additional Training Packages Available

Smart Technology provides all kinds of training from basic packages that are included free for each system user, to on-site large group training seminars that can provide comprehensive training for even the most demanding clients. The following is a brief listing of our training packages:

- Basic level Online training
- Advanced level Online training
- 1 on 1 Web X training
- Group Training Onsite Training
- Large Group Onsite Training

For more information on the training packages that we have available, please visit our web site at http://www.smarttechtools.com

Chapter #15 - System Updates and Upgrades

The SMART.BIZ.KIT system was designed with an advanced software updating functionality that automatically downloads and installs updates to your SMART.BIZ.KIT system.

smartBizKit 2.0 Software Update
smartBizKit Update
There is a new version of the system software that must be downloaded and installed before you enter the system. Please click update below to install the newest update to your software.
Update smartBizKit Software

When you login to the SMART.BIZ.KIT, the system will attempt to connect to the Smart Technology website and check on the current release version to see if your system is running the most recent version. If it is not, then an update window, like the one displayed above, will be displayed. Because the SMART.BIZ.KIT system is designed as a group system, it is imperative that all systems are running the same version to keep all of the data in the same structured layout.

When your system begins a sync process, it will also check to confirm that your system is running the current version. This is required in order to ensure that the sync process can complete correctly. You will also be prompted with the update window as shown above when it is detected that your system software is out of date. When the Update Notice window appears, you have the ability of waiting until later to complete the update, or you can click on the (Update smart.Biz.Kit Software) button to start the Update process immediately. Updating the system software takes approximately 3 minutes using a standard DSL Internet connection. A faster line will take less time and a dial up line will take approximately 10 minutes to perform the update process.

While the update process is taking place, you will see an update window as it appears on the right. This window contains a status bar that indicates the progress during the update. Depending on what updates have taken place to your SMART.BIZ.KIT system, there may be a need to update the data that is in the database on your local computer. If this is true, a message box will appear that will indicate that the updater is refreshing your database. If this message appears, you will not be able to access the data in your SMART.BIZ.KIT until the updater has completed its work in refreshing your data. This process can take different amounts of time depending on the amount of data that you have stored in your groups database.

When the update process has been completed, the system login prompt will appear again and you will need to login to the system to continue. Once you login to the system, you will be presented with a “What’s New” window that will detail the specific items that have been changed, or updated in this new version.

Chapter #16 - Contacting Smart Technology

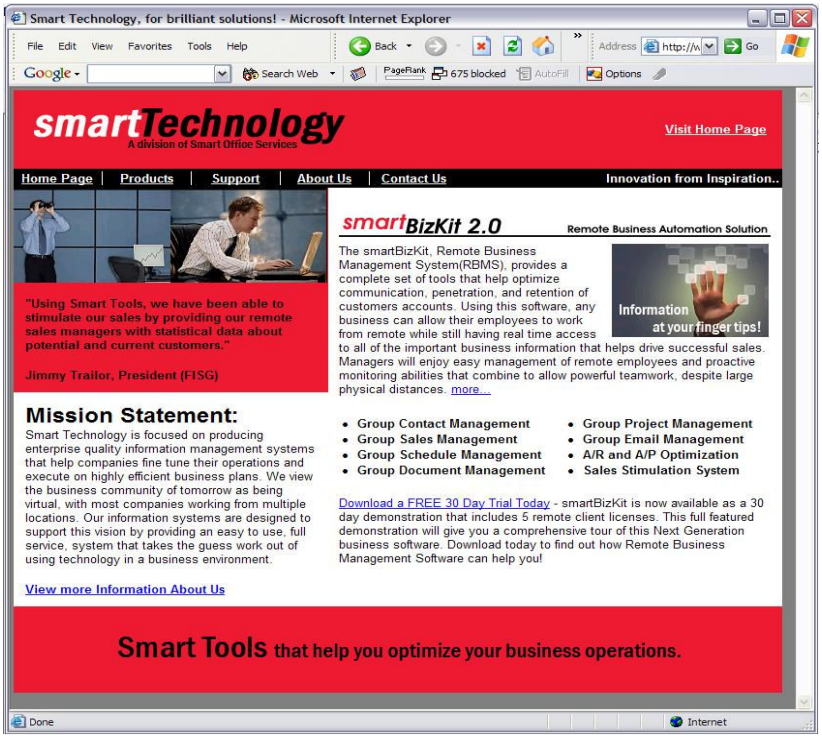
No matter what your specific needs may be, Smart Technology is always here when you need us most. Our highly training and professional staff are available anytime to provide assistance in any situation.

Our normal business hours of operation are 9am – 5pm EST Monday thru Friday. We have engineers on staff 24/7/365 to support our clients that have advanced support service agreements. Our call center is open 24/7/365 to provide you with immediate contact and assistance when you need it most.

Our web site, http://www.smarttechtools.com provides a large listing of support services that provide immediate assistance free of charge. The following services are provided on our web site:

- Extensive searchable product knowledgebase
- Online product documentation
- User support forums and message boards
- User, Developer, and Manager mail lists that provide direct contact with the system developers

Please visit our web site for more information on our products and support services.


Smart Technology, for brilliant solutions! - Microsoft Internet Explorer
smartTechnology
A division of Smart Office Services
Visit Home Page
Home Page | Products | Support | About Us | Contact Us
Innovation from Inspiration..
"Using Smart Tools, we have been able to stimulate our sales by providing our remote sales managers with statistical data about potential and current customers."
Jimmy Trailor, President (FISG)
smartBizKit 2.0
Remote Business Automation Solution
The smartBizKit, Remote Business Management System(RBMS), provides a complete set of tools that help optimize communication, penetration, and retention of customers accounts. Using this software, any business can allow their employees to work from remote while still having real time access to all of the important business information that helps drive successful sales. Managers will enjoy easy management of remote employees and proactive monitoring abilities that combine to allow powerful teamwork, despite large physical distances. more...
Information at your finger tips!
Mission Statement:
Smart Technology is focused on producing enterprise quality information management systems that help companies fine tune their operations and execute on highly efficient business plans. We view the business community of tomorrow as being virtual, with most companies working from multiple locations. Our information systems are designed to support this vision by providing an easy to use, full service, system that takes the guess work out of using technology in a business environment.
View more Information About Us
Group Contact Management
Group Sales Management
Group Schedule Management
Group Document Management
Group Project Management
Group Email Management
A/R and A/P Optimization
Sales Stimulation System
Download a FREE 30 Day Trial Today - smartBizKit is now available as a 30 day demonstration that includes 5 remote client licenses. This full featured demonstration will give you a comprehensive tour of this Next Generation business software. Download today to find out how Remote Business Management Software can help you!
Smart Tools that help you optimize your business operations.